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MARCH 1975

FRUIT Situation

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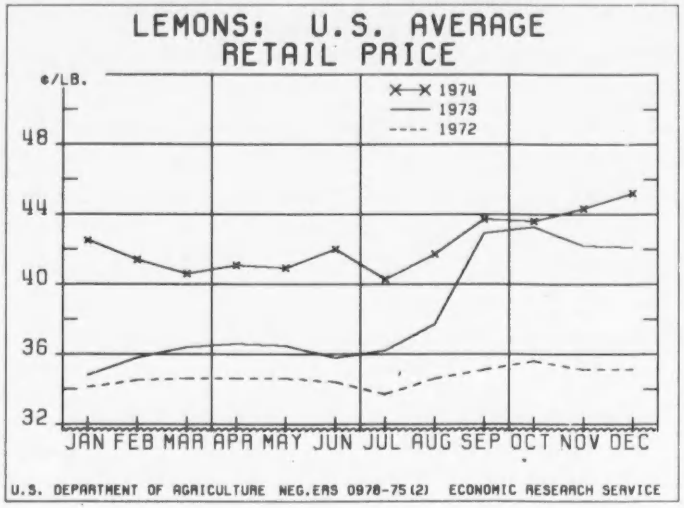
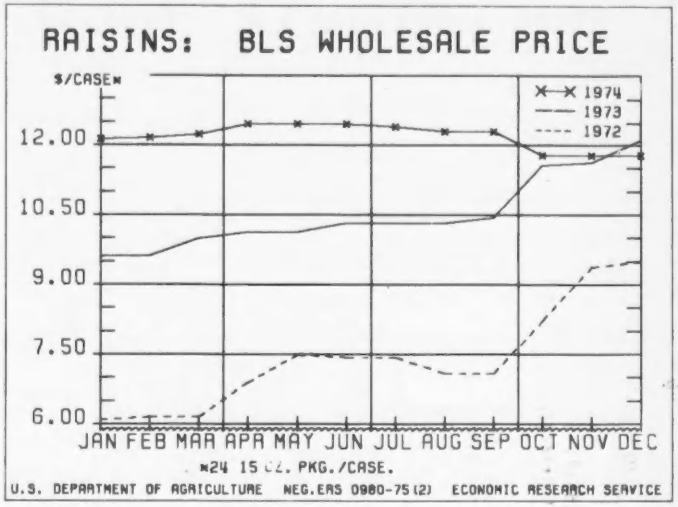

LEMONS: U.S. AVERAGE RETAIL PRICE
¢/LB.
1974
1973
1972
48
44
40
36
32
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
U.S. DEPARTMENT OF AGRICULTURE NEG.ERS 0978-75(2) ECONOMIC RESEARCH SERVICE


RAISINS: BLS WHOLESALE PRICE
$/CASE*
1974
1973
1972
12.00
10.50
9.00
7.50
6.00
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
*24 15 OZ. PKG./CASE.
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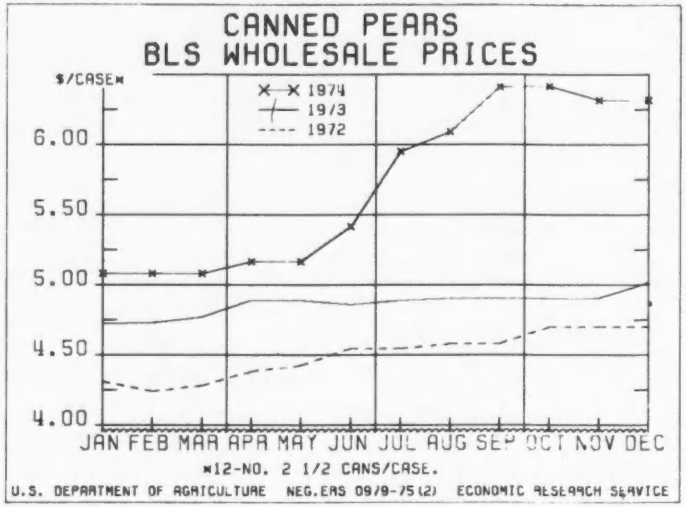
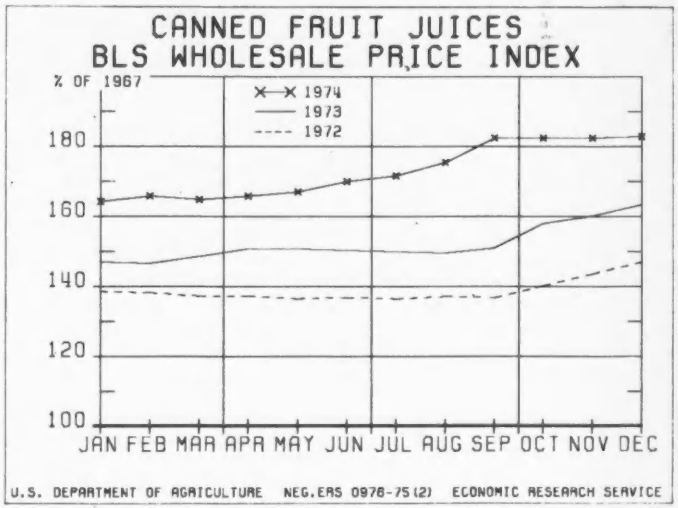

CANNED PEARS BLS WHOLESALE PRICES
$/CASE*
1974
1973
1972
6.00
5.50
5.00
4.50
4.00
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
*12-NO. 2 1/2 CANS/CASE.
U.S. DEPARTMENT OF AGRICULTURE NEG.ERS 0979-75(2) ECONOMIC RESEARCH SERVICE


CANNED FRUIT JUICES BLS WHOLESALE PRICE INDEX
% OF 1967
1974
1973
1972
180
160
140
120
100
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
U.S. DEPARTMENT OF AGRICULTURE NEG.ERS 0978-75(2) ECONOMIC RESEARCH SERVICE

THE FRUIT SITUATION

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SUMMARY

Fruit supplies for the remainder of the 1974/75 season are expected to total substantially above a year earlier. Large citrus supplies continue to dominate the fruit scene. A record U.S. citrus crop of 14.2 million tons is indicated for the 1974/75 season in spite of recent subfreezing temperatures in California and Texas. Yearend stocks of most processed noncitrus products are ample for market needs. Cold storage holdings of major fresh deciduous fruits are also larger than a year ago.

For the first time during 1974, the index of prices received by growers for fresh and processed fruit declined during December to levels below a year earlier. The January 1975 index increased slightly from December 1974, but was still 3% below the same month a year earlier. During the first half of 1975 the index is expected to advance seasonally and will likely average near year-earlier levels.

Retail prices of fresh fruit also have declined since last fall, reflecting the seasonal increase in fruit supplies, especially citrus, but continued to average moderately higher than a year earlier. However, the January 1975 BLS retail price index for fresh fruit advanced slightly from December 1974. As remaining supplies of fresh fruit decline seasonally, consumer prices are likely to advance during the first half of 1975 and average moderately above the comparable 1974 period.

The Nation's orange crop is now expected to total a record 234 million boxes or 10.1 million tons. This output is 8% above last season and 4% above 1972/73. About three-fourths or 174 million boxes will come from Florida, which expects a 5% larger output. California's prospective orange crop at 50 million boxes would be the largest since 1946/47. With a large Naval crop this season, the supply for fresh market is expected to be adequate in spite of the diversion of freeze-damaged fruit to processing. Arizona's indicated production of 4.5 million boxes is 32% above last season, while the forecast for Texas at 5.1 million boxes is 23% smaller.

On-tree grower returns for all U.S. oranges in January were 13% below a year earlier. Large crop prospects combined with large carryover stocks of most processed items will keep downward pressure on orange prices. Current prospects for oranges through early spring indicate grower prices will continue below year-earlier levels.

Prospective grapefruit supplies at 58.8 million boxes are 10% less than last season. Florida's crop is expected to total 43 million boxes, 11% less than last season, while the Texas crop is 27% smaller. Through mid-February, the movement of fresh grapefruit into

domestic marketing channels was substantially ahead of last year's pace, while exports and deliveries to processors were lower. With smaller remaining supplies available and recently improved export prospects, grower prices will advance and remain above year-earlier levels.

Indicated lemon supplies in California and Arizona are a record 25.5 million boxes, 46% above last season's small harvest. Total shipments of fresh lemons through mid-February were slightly above last season. Sales of lemons for processing are up sharply, reflecting the larger crop. Grower returns for fresh and processed lemons have averaged sharply below a year ago and are expected to remain low during the remainder of the season.

Supplies of fresh apples remaining in storage are 6% above a year ago. So far this winter, average U.S. apple prices to growers have been below year-earlier levels, reflecting larger supplies and slackening processor demand. However, later in the season when most of the fresh apples will come from Washington State, prices are expected to be slightly to moderately higher than a year ago.

In response to substantially larger cold storage holdings, shipping point prices for fresh winter pears have also been below year-earlier levels. Even though these prices may advance seasonally for the remainder of the season, they are likely to continue below year-ago levels.

The 1974/75 pack of canned noncitrus fruit will be considerably above last year's levels. Thus, even with a substantially smaller carryover, total supplies of canned fruit for the 1974/75 marketing season are considerably above those a year earlier. Despite a larger supply, canners' selling prices have increased as a result of higher costs for raw materials, processing, and marketing. The BLS index of wholesale canned fruit prices reached 170.4 (1967=100) in January 1975, an increase of 26% from a year ago. These higher wholesale prices have also been reflected at retail.

Storage holdings of frozen deciduous fruits and berries on February 1 were substantially above last season, with increases recorded for most items. Production of dried fruit for the 1974/75 season was moderately below a year ago. However, with a considerably larger carryin at the beginning of this season, supplies of dried fruit are ample. F.o.b. prices of both dried prunes and raisins have been below year-earlier levels reflecting the larger supply and lagging movement.

Disappearance has lagged for many processed noncitrus items—particularly canned and frozen—because of generally higher prices and a slowdown in economic activity here and abroad. In order to encourage an increase in the rate of movement, processors have offered promotion allowances for many items in recent weeks. Although there has been some weakening in prices, they are still substantially above year-earlier levels.

RECENT DEVELOPMENTS AND OUTLOOK

GENERAL PRICE OUTLOOK

In December, for the first time during 1974, the index of prices received by growers for fresh and processed fruit declined to the levels below a year earlier. The January 1975 index increased to 135 (1967=100) from 132 in December 1974, but was still 3 percent below the same month a year earlier. Prices received by growers during January averaged below a year ago for all fresh fruits being sold except grapefruit.

Grower prices for most fresh fruit will advance seasonally during the first half of 1975, but are likely to remain below year ago levels. However, with higher contract prices for peaches and pears for the 1974/75 season, the index of prices received by growers for fresh and processed fruit during the first half of 1975 is likely to average near year-earlier levels.

Retail fresh fruit prices during 1974 have also averaged higher than a year ago, but they have declined since last fall, reflecting the seasonal increase in supplies of fresh apples and citrus. The average BLS retail price index for fresh fruit in December 1974 declined to 143.1 from the record high of 168 in July (1967=100). However, the January 1975 index advanced to 146.3 and was 6 percent above a year ago. As supplies of remaining fresh noncitrus and citrus decline seasonally, the index for fresh fruit is likely to advance during the first half of 1975 and average moderately above the comparable 1974 period.

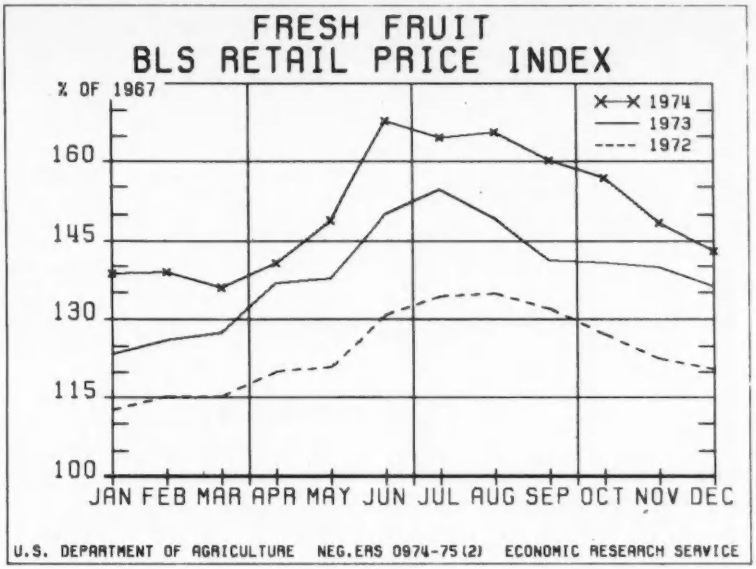
Despite large supplies of processed noncitrus, wholesale prices have been raised as a result of higher costs for raw products, processing and

Index of quarterly prices received by growers for fresh and processed fruits

Year	(1967=100)			
	1st	2nd	3rd	4th
1971	100.4	113.9	106.6	105.7
1972	106.1	113.5	119.3	108.2
1973	126.2	136.9	138.1	142.2
1974	138.1	147.1	150.4	145.0

Quarterly retail price indexes for fresh fruits

Year	(1967=100)			
	1st	2nd	3rd	4th
1971	107.1	119.2	129.9	113.7
1972	114.4	124.0	133.6	123.5
1973	125.8	141.5	148.4	138.9
1974	137.7	152.5	163.5	149.5


FRESH FRUIT
BLS RETAIL PRICE INDEX
% OF 1967
1974
1973
1972
160
145
130
115
100
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
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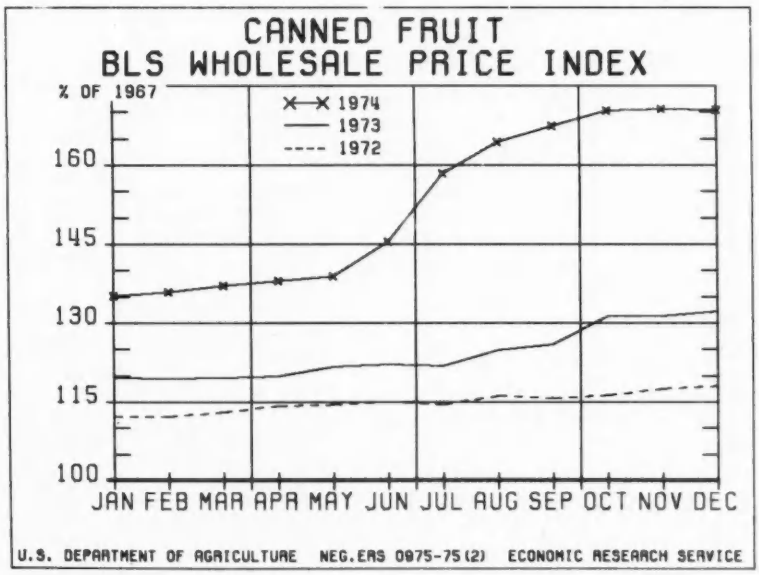

CANNED FRUIT
BLS WHOLESALE PRICE INDEX
% OF 1967
1974
1973
1972
160
145
130
115
100
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
U.S. DEPARTMENT OF AGRICULTURE NEG.ERS 0975-75(2) ECONOMIC RESEARCH SERVICE

marketing. The largest increase was recorded for canned fruits. The BLS index of wholesale canned fruit price was 170.4 in January 1975, unchanged from December 1974, but still 26 percent above a year ago. A moderate advance between January 1974 and January 1975 was also recorded for wholesale prices of frozen fruits and juices, while dried fruit prices were below a year ago. With higher prices, movement of most processed fruit items has weakened in both domestic and foreign markets. Slackening demand in the foreign markets has been caused by faltering general economic conditions around the globe. Rising unemployment and declining real incomes of consumers together with higher fruit prices are responsible for slow domestic movement of most processed fruit. In order to stimulate movement, processors have offered promotion allowances for most processed fruits in recent weeks. In view of larger stocks, wholesale prices of most processed fruit are likely to remain relatively stable during the months ahead until the new packing season begins this summer. But prices will still be substantially above year-earlier levels.

Reflecting higher wholesale prices, retail prices for processed fruit have been considerably above year ago and will remain so during the first half of 1975.

FRESH CITRUS

In spite of subfreezing temperatures this winter in California and Texas, a record U.S. citrus crop is indicated for the 1974/75 season. The total U.S. production of citrus for the season is estimated at nearly 14.2 million tons, up 6 percent from last season and 2 percent above the previous record in 1972/73. Oranges and lemons accounted for the increase, production of grapefruit is down.

The cold weather experienced in California during December 23-26, December 30-January 2, and January 27-30, is not expected to reduce the quantity of oranges and lemons. It appears that crop damage was mainly to quality, but affected fruit will be diverted to processors. Some midseason oranges sustained damage in Texas on January 13 and 14, but these will also be diverted.

Citrus fruit: Production, 1972/73, 1973/74, and indicated 1974/75

Crop	1972/73	1973/74	1974/75
	1,000 tons	*1,000 tons*	*1,000 tons*
Oranges	9,737	9,396	10,091
Grapefruit	2,676	2,677	2,400
Lemons	844	665	969
Limes	44	42	46
Tangelos	140	166	198
Tangerines	223	208	226
Temples	230	238	238
Total	13,894	13,392	14,168

Oranges

Record Large Crop

As of February 1, the U.S. orange crop was forecast at a record 233.6 million boxes (10.1 million tons), 8 percent above last season and 4 percent above 1972/73. Early, midseason and Navel varieties accounted for 126.1 million boxes, about 6 percent above a year ago. The later Valencia crop was estimated at 107.5 million boxes, a tenth higher than last season.

In Florida, prospects continued to indicate a record orange crop of 174 million boxes, 5 percent above last season and nearly 3 percent above 1972/73. Harvest of early and midseason oranges in Florida was nearly 70 percent complete by mid-February. Production of these varieties was expected to total 97 million boxes, up 5 percent from the previous record set last season. Florida Valencia oranges, at 77 million boxes, were up 4 percent from last year.

Current prospects indicate California's orange production of 50 million boxes is the largest since 1946/47. Navel orange output at 25 million boxes is 14 percent above last season. With a large crop in prospect this year, the supply of Navels for fresh market is expected to remain ample in spite of diversion of damaged fruit to processing. By mid-February, about 58 percent of the total crop remained to be harvested. Supplies of California Valencias later in the season (accounting for the remaining 25 million boxes) will be one-third larger than last season.

Arizona's indicated total production of 4.5 million boxes was 32 percent above last season, while the forecast for Texas at 5.1 million boxes was 23 percent smaller.

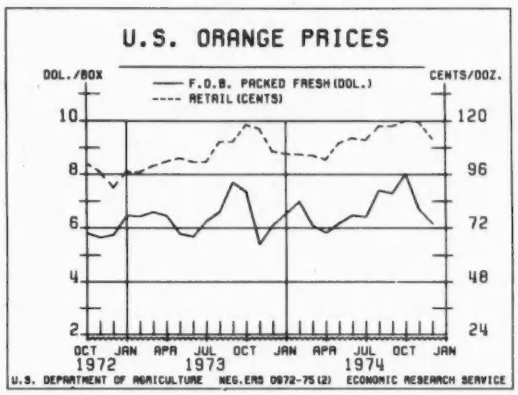
Fresh orange shipments from Florida through mid-February this season were nearly one-third above year-earlier levels. Substantially larger domestic shipments offset a slight decline in exports. Although Florida's f.o.b. prices for early and midseason varieties were below last year's level earlier in the season, they have strenghthened in recent weeks. Consequently, average f.o.b. prices to date are virtually the same as last season. Shortly, however, the large supplies of the later Valencia crop will be available for market, and fresh fruit prices will decline seasonally during late winter and early spring.

Florida's delivered-in prices for processing of early and midseason varieties have averaged moderately below year-earlier levels, and are expected to remain so due to the record large orange crop and large stocks of most processed orange products.

Domestic fresh shipments of Navel oranges from California and Arizona by mid-February were substantially larger than a year ago. Export shipments were nearly twice as large as last season. In addition, deliveries to processors were substantially larger during this period. Even without the freeze damage in California, more fruit likely would have been processed this season because of the large size Navel crop.

Prices of fresh California-Arizona Navels are under some downward pressure this season in light of the record crop. The average f.o.b. price for the season to mid-February was $3.73 per carton, compared to $3.83 last season. Large orange supplies, especially after the Valencia harvest gets underway, will probably continue to exert downward pressure on price.

With the substantially smaller crop, Texas f.o.b. prices for fresh fruit and delivered-in prices for processing have averaged moderately above year earlier levels.



Grapefruit

U.S. production of grapefruit is forecast at 58.8 million boxes or 2.4 million tons, about 10 percent below the last two seasons. With nearly three-quarters of the U.S. total, Florida now expects a crop of 43 million boxes off 11 percent from last season. The Texas crop is expected to be 7.8 million boxes, down 27 percent from last season while California at 5.5 million boxes is up 29 percent.

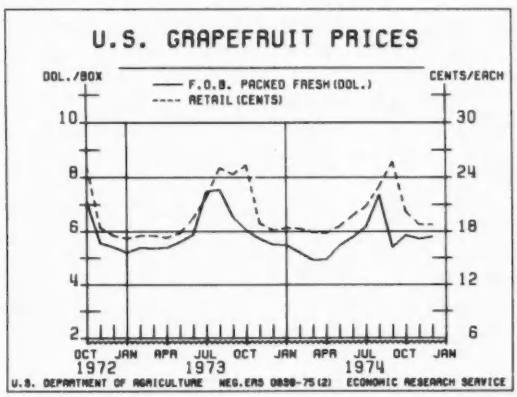
The historical trend for bearing acreage, production and yield per acre for the U.S. and by States from 1959/60 to 1973/74 are shown in figure 1. The increase in Florida production during the 1970's was due primarily to the increase in bearing acreage, and to a lesser extent improved yields. Bearing acreage in Florida increased from 92,300 acres during 1959/60 to 115,700 in 1973/74. Yields also improved during this period from 14.05 tons per acre to 17.67—the highest in all producing areas. Increased production in Texas, on the other hand, during the last 15 years was largely the result of improved yields.

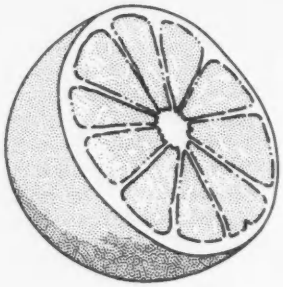
Harvest of winter grapefruit in the U.S. this season was nearly 50 percent complete by mid-February, compared with 44 percent a year ago. In Florida, picking is ahead of last season with 47 percent completed, while 72 percent of the crop has been harvested in Texas. In California and Arizona, about 26 percent of the grapefruit crop has been harvested.

The movement of fresh grapefruit from Florida into domestic marketing channels this season is ahead of last year's pace, while exports and deliveries to processors are lower. Florida's domestic fresh sales through mid-February were about one-quarter larger than last season. However, exports during this period were about half the volume of a year earlier. In spite of lower f.o.b. prices earlier in the season, prices in Florida have advanced to levels above a year earlier. As a result, the average f.o.b. prices through mid-February were virtually the same as last season. With smaller remaining supplies available and improved export prospects recently, prices will continue to advance and remain above year earlier levels.

The improved export prospect involves shipments of Florida grapefruit to Japan. Caribbean fruit fly larvae were discovered, at the end of last season's shipments of Florida grapefruit to Japan. Consequently, Japan imposed an embargo on future shipments from Florida. On February 7, 1975, it was announced that the Japanese government has approved a method of fumigation which will make it possible for Florida to supply them with fresh grapefruit. The bulk of these shipments are in February-April. In view of smaller remaining supplies and late start of shipments to Japan, grapefruit exports from Florida will be substantially less this season.

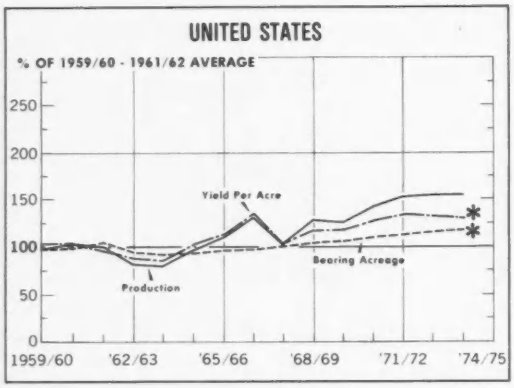
Total fresh grapefruit shipments from Texas through early February were slightly lower this season, compared with a year earlier, causing f.o.b. prices to average moderately above year earlier levels. With the substantially smaller crop in Texas, deliveries to processors are down sharply. The delivered-in price for this fruit has averaged well above year-ago levels as a result.

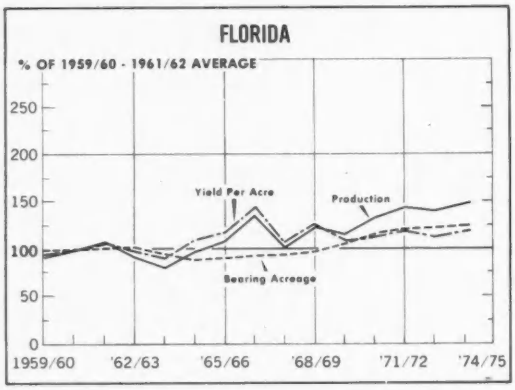


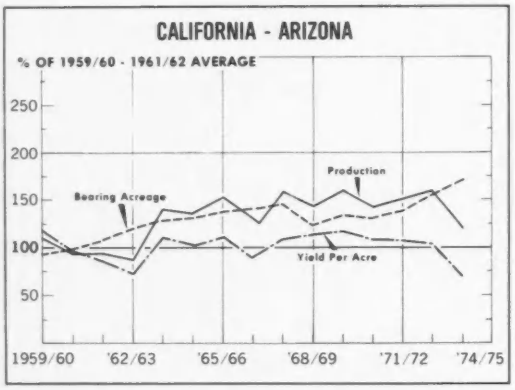


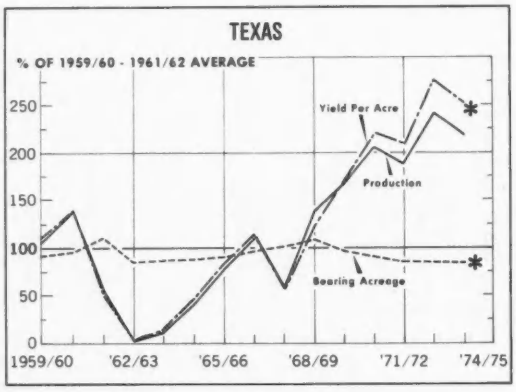
GRAPEFRUIT:

ACREAGE, YIELD, AND PRODUCTION









YEAR BEGINNING OCTOBER

** ESTIMATED TEXAS AND UNITED STATES BEARING ACREAGE AND YIELD PER ACRE.*

USDA

NEG. ERS 1007 - 75 (2)

Figure 1

Lemons

California and Arizona expect a record lemon crop of 25.5 million boxes, 46 percent above last season's harvest. California's production of 19.5 million boxes is one-third more than last season, while Arizona's record 6 million boxes is more than double last season.

As of mid-February, picking of the California and Arizona lemon crop was more than half complete. Cold weather and lack of rain in California have caused some damage and small sizes. However, in Arizona sizes were running larger due to the late picking this year with about 70 percent of the current harvest going to processors.

Total shipments of fresh lemons through mid-February were slightly above the total for the same period last year. Although domestic movement has been off moderately, the decline was more than offset by substantially larger exports. To date, the average shipping point price has averaged substantially below last year's level, and will continue so the remainder of this season because of the record large crop.

Sales of lemons for processing are up sharply, reflecting the larger crop. Consequently, grower returns for processing lemons are down substantially so far this season. During January, the on-tree grower return for processing lemons averaged 31 cents per box, compared with 70 cents a year ago.

Other Citrus

Florida's Temple crop was forecast at 5.3 million boxes, the same as the 1973/74 season. Harvest as of February 1 was 28 percent complete, compared with 25 percent last year. Fresh temple orange shipments were moderately above year-earlier levels and are moving toward their seasonal peak; f.o.b. prices appear moderately below last season.

The U.S. tangerine crop is expected to total 5.2 million boxes, up 9 percent from last season. Florida now expects a crop of 3.1 million boxes, an increase of 11 percent over last season. Picking was 90 percen complete by February 1. Although fresh shipments are slightly above last year's level, shipping point prices are also slightly higher so far this season. The harvest of tangerines continues active in central California with harvest of the 1.4 million box crop more than half completed. Although January freezing temperatures in California may have caused some damage to the remaining crop of tangerines, the extent of damage has not been appraised and reported as yet.

Tangelo production in Florida was forecast at a record 4.4 million boxes, 19 percent above last season. Heavy movement was completed by February 1 with 4 million boxes harvested. In spite of the heavy movement of fresh fruit, shipping point prices for tangelos are holding firm, averaging $2.75 per carton so far this season, compared with $2.84 last year.

PROCESSED CITRUS

Utilization of the 1974/75 citrus crop for processing will be substantially larger than the 9.6 million tons processed last season. The record U.S. orange and lemon crops and the diversion of freeze damaged fruit to processing in California are responsible for the gain.

Grapefruit processing is not expected to come up to last season's level because of the smaller crop, but larger carryins are likely to result in an expanded total supply of these products, too.

Grower returns in Florida for processing oranges and grapefruit are much lower than last season, while in Texas they are averaging above year-earlier levels.Returns for California-Arizona processing lemons are sharply below a year ago.

Frozen Concentrates

Another large pack of frozen concentrated orange juice (FCOJ) is anticipated in Florida. The larger orange and Temple crop, coupled with a projected juice yield of 1.29 gallons of 45-degree brix concentrate per box, will probably result in a slightly larger pack of FCOJ than the record set during 1972/73. Assuming the utilization of Florida oranges and Temples for frozen concentrate continues to trend upward during 1974/75—say 78 percent of the crop—production of FCOJ from this crop is estimated to approach the 180 million gallon level, compared with 172 last season. This pack, combined with imports and the larger carryin at the beginning of the season, is likely to result in a 5 percent larger total supply of FCOJ during 1974/75.

Canner list prices of FCOJ were increased during the latter part of December 1974, to $2.10 per dozen 6-ounce cans (unadvertised brands, Florida canneries) from $1.95. Early February, several Florida processors announced a promotion which read as follows: For every case of FCOJ shipped or withdrawn during February 3-28 at list price, the purchaser is eligible to buy 2 cases for shipment from March 3-28 at $.25 per dozen off the 6-oz. list price. Total product movement reported by processors during the first 2 months of this season was up nearly 13 percent. Sales of FCOJ have benefitted from higher costs of competing drinks, of which sugar is a major ingredient. However, U.S. exports of FCOJ during the first 2 months of the 1974/75 season (November-December), totaled about 1.4 million gallons, nearly 10 percent below the same period last season. While shipments to Canada, the major foreign destination, were up substantially they were offset by sharply lower exports to Europe. Consumption of citrus products in Europe is off from

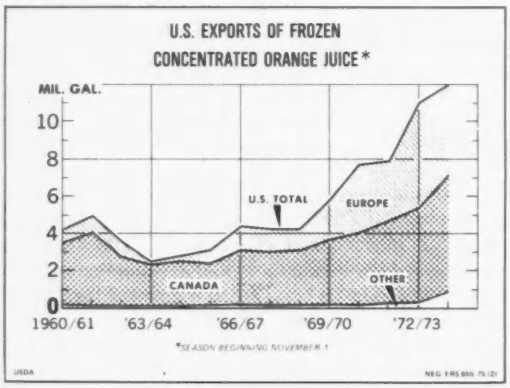
Florida oranges used for frozen concentrate

Crop year	Florida orange and Temple production	Used for frozen concentrates		Yield per box	Frozen concentrate orange juice pack[1]
	Million boxes	*Million boxes*[2]	*Percent*	*Gallons*	*Million gallons*
1969/70	142.9	100.7	70.5	1.24	124.9
1970/71	147.3	103.5	70.3	1.21	125.2
1971/72	142.3	104.4	73.4	1.29	134.2
1972/73	174.8	132.2	75.6	1.33	176.1
1973/74	171.1	132.5	77.4	1.30	171.8
1974/75	179.3			[3]1.29	

[1] 45° Brix. [2] Includes small quantities of tangelos and Murcotts. [3] Estimated.

the preceding year's level in response to the decline in real disposable income.

Retail prices during the last quarter of 1974 were stable at about 26.6 cents per 6-ounce can. However, they are likely to increase moderately during the first quarter of 1975, reflecting the increased f.o.b. price. Once this price adjustment has been passed through, prices are expected to be relatively stable for the remainder of this season in view of the large supply of FCOJ.



Canned Citrus

Florida stocks of canned citrus products at the beginning of this season were one-fourth larger than a year earlier, and nearly two-fifths more than 2 years ago. Although the movement to mid-February has been moderately lower this season, the large carryin has been offset by a substantially reduced pack. A 20 percent decline in the canned grapefruit juice pack so far was chiefly responsible. Stocks of canned citrus products on hand mid-February were only 6 percent larger than a year earlier.

Available supplies of canned grapefruit juice were 14 percent larger this season as of February 15. The much larger carryin has been partially offset by a reduced pack, while movement was virtually the same as last season. Florida f.o.b. prices of unsweetened single-strength canned grapefruit juice have been stable at $4.50 per case (12/46-ounces) in recent months. However, a price decline for sweetened product was announced late in January by several Florida processors, to $4.70 per case from $4.95. The continuing decrease recently in sugar prices was chiefly responsible.

Supplies of canned orange juice are expected to be larger this season in view of the record orange crop in Flroida. Although prices advanced early in January, by the end of that month Florida f.o.b. prices of unsweetened product declined to the previous level of $4.35 per case (12/46-ounce). Effective February 17, the list price for this product was increased to $4.50 per case.

On November 21 the USDA announced the purchase of 120,000 cases (12 No. 3 cylinder cans) of canned orange juice for distribution to needy families. Last season the USDA purchased 408,000 cases for distribution.

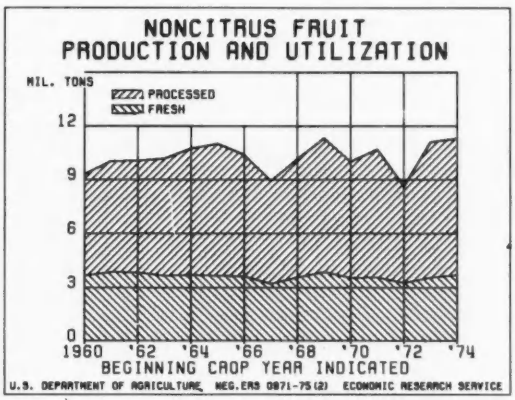
Chilled Juice

Florida's pack of chilled orange juice processed directly from fresh fruit was 39.3 million gallons through February 15, up 3 percent from last season. The pack from reprocessed juice was about the same as last season, while the pack from frozen concentrate was up sharply. The net pack (excluding S.S. reprocessed juice), at 49.3 million gallons, was 7 percent larger. However, the volume of goods on hand as February 15 was substantially lower than a year ago since total product movement continued to increase moderately and the carryin at the beginning of the season was 10 percent smaller. Retail prices of chilled orange juice continued to increase during most of 1974. In January 1975, the U.S. average retail price was 52.6 cents per quart, compared with 48.5 cents in January 1974.

Chilled grapefruit juice stocks on February 15 were 2.3 million gallons, well below the levels of the past two seasons. Product movement was 6.5 million gallons, slightly above last season, but the season's pack to date is off substantially. The smaller grapefruit crop suggests the pack may be down this season.

Utilized noncitrus fruit production during 1974 was slightly larger than that of 1973, but nearly three-tenths above the smaller 1972 crop. Apricots, pears, sweet cherries, and dried prunes lead the list of smaller crops in 1974. These were offset by slightly to moderately larger supplies of apples, nectarines, plums, California clingstone peaches, tart cherries, and cranberries. Total bearing acreage of noncitrus fruit during 1974 was slightly above a year ago, 16.4 versus 16.2 million acres (including strawberries).

With the 1974 utilizated production slightly higher than the previous year, grower prices averaged lower. Consequently, the total value of 1974 production for decidous fruits and berries at ½2 billion dropped 2 percent from 1973 with apples and grapes leading the decline.



Apples

Crop Up Slightly

The 1974 utilized commercial apple crop at 6.4 billion pounds was 2 percent more than 1973 and 9 percent above the smaller 1972 crop. This was the largest utilized crop since the 6.7 billion pound crop of 1969. The larger crop was due to higher production in Eastern and Central States. The increases in production from New York, New England, and North Carolina more than offset smaller crops from Pennsylvania, Virginia, West Virginia, and Maryland. The larger crop in the Central States was due primarily to higher production from Michigan with a crop of 670 million pounds, up 43 percent from the 1973 depressed level. Moderately to substantially smaller crops were reported for all States in the West. Washington—the No. 1 apple State—produced a crop of 1.8 billion pounds, 6 percent less than last year's record crop.

With a substantially larger apple crop from Michigan, production in the Central States in 1974 at nearly 1.15 billion pounds increased about 30 percent from 1973 and its share of the total U.S. crop rose from 14 to 18 percent. Production from the Eastern States during 1974 at 2.7 billion pounds was almost 9 percent higher and accounted for the largest share of the apple crop, up from 40 in 1973 to 42 percent this year. As a result of the smaller 1974 crop in Washington, production in the Western States, at 2.5 billion pounds, decreased 12 percent from 1973 and accounted for 40 percent of the U.S. apple crop, compared with 46 percent in 1973.

By individual variety, the Red Delicious is still the leader, but the crop was down 6 percent from 1973 to 32 percent of the total apple production from 35 percent last season. This reflected chiefly the substantially smaller crop in Washington. However, Golden Delicious maintained the 16 percent share of the last 3 years. Total production of Golden Delicious has been trending upward with production up 7 percent from 1973. A 20 percent increase in Golden Delicious production in Washington was chiefly responsible for the larger crop in 1974. McIntosh returned as the third leading variety replacing Rome Beauty, as the 1974 McIntosh crop in New York and Michigan increased sharply from their small 1973 output. The table below provides the comparison between 1973 and 1974 for the 6 leading apple varieties.

Apple production by leading varieties and State, 1973 and 1974

Leading varieties	U.S. production		Percentage of U.S. total apple production		Leading producing States	State production as percentage of U.S. production by variety	
	1973	1974	1973	1974		1973	1974
	Million pounds	*Million pounds*	*Percent*	*Percent*		*Percent*	*Percent*
Delicious	2,174.2	2,050.4	35	32	Washington	55	50
Golden Delicious	975.5	1,045.4	16	16	Washington	47	52
McIntosh	487.4	708.5	8	11	New York	47	43
Rome Beauty	511.9	477.7	8	75	New York	18	20
Jonathan	379.3	356.0	6	6	Michigan	32	48
York Imperial	341.7	257.9	5	4	Pennsylvania	41	44
Total	4,870.0	4,895.9	78	77			

Stocks Up Moderately

Supplies of apples in cold storage at the end of January amounted to 1.7 billion pounds, an increase of 6 percent from a year earlier. About 61 percent of these stocks were in controlled atmosphere storage, up almost one-fifth from the same period a year ago. However, supplies in regular storage were 8 percent smaller. As expected, stocks in Eastern and Central States accounted for most of the increase reflecting the larger crops. As a result of the smaller apple crop in the Western States, cold storage stocks at 953 million pounds were down 4 percent from a year ago. Most of cold storage holdings of apples are in Washington which had approximately 845 million pounds, down from 869 million pounds last year.

Apple cold storage holdings at end of month

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Billion pounds	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*	*Billion pounds*
1972												
Regular	.80	.47	.22	.11	.06	.04	.03	.02	.75	1.65	1.37	.89
C.A.	.81	.72	.56	.36	.17	.04	.01	[1]	.21	.79	.85	.85
Total	1.61	1.19	.78	.47	.23	.08	.04	.02	.96	2.44	2.22	1.74
1973												
Regular	.52	.27	.13	.07	.04	.02	.01	.02	1.09	2.09	1.65	1.61
C.A.	.81	.70	.43	.27	.10	.03	[1]	[1]	.28	.84	.89	.91
Total	1,33	.97	.56	.34	.14	.05	.01	.02	1.37	2.93	2.54	2.52
1974												
Regular	.71	.39	.19	.10	.05	.02	[1]	.01	.81	2.07	1,62	1.15
C.A.	.86	.77	.59	.36	.15	.05	.01	---	.26	1.04	1.06	1.06
Total	1.57	1.16	.78	.46	.20	.07	.01	.01	1.07	3.11	2.68	2.21
1975												
Regular	.65											
C.A.	1.02											
Total	1.67											

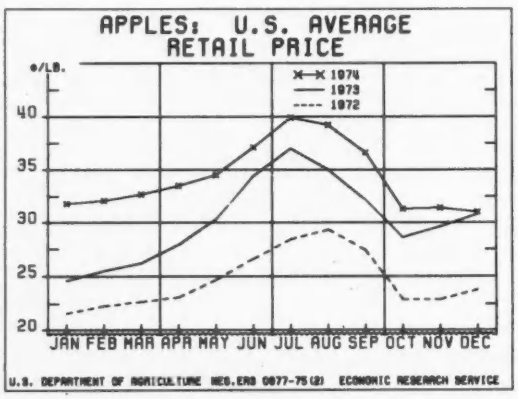
[1] Less than 0.005 billion pounds.

C.A.—Controlled atmosphere.

Market Outlook

Although the apple season started later in 1974/75, fresh apple movement through mid-February was running 9 percent ahead of year earlier-levels. Most increases were from the Eastern States. Shipments from Washington, where most of the apples are for fresh use, ran nearly 10 percent smaller through mid-February.

The larger shipments from the Eastern States, combined slackening demand for apples for processing use, have kept average f.o.b. fresh apple prices in the East moderately to substantially below year-earlier levels. In January, the U.S. average price received by growers for fresh use was 9.8 cents per pound, 7 percent below a year ago. However, the smaller apple crop in Washington has resulted in substantially higher Red Delicious prices in the West. Shipping point prices for Red Delicious at Yakima Valley, Washington, for carton tray pack, extra fancy 125's and larger in mid-February were $7.82 compared with $5.78 a year earlier. The U.S. retail fresh apple price in January 1975, averaged slightly below a year ago.



Since the available supplies of apples for processing use are larger this season than last, prices for processing apples have averaged below the high levels of last season. In the East, where a very large proportion of apples are for processing use, prices of apples for processing were reported moderately to substantially below last season's levels. Although

the packing season will continue well into spring, the heavy movement of apples to processors is over. Thus, with a larger inventory of processed apple products plus slackening demand, apple prices for processing uses are likely to continue lower the remainder of the season. Later in the season when most fresh apples being marketed will come from Washington State, prices are expected to be slightly to moderately higher. Furthermore, continued strong foreign demand is expected to add further strength to the market for fresh apples. The U.S. season average price to growers for the 1974 apple crop (for all uses) has been estimated at 8.2 cents per pound, about 7 percent below 1973 prices. Total value of the U.S. commercial crop is therefore estimated at $523 million compared with $545 million in 1973.

Exports Up, Imports Down

U.S. exports of fresh apples continue strong. During July-December 1974, total exports of fresh apples amounted to 106 million pounds, an increase of 10 percent from the corresponding period a year ago. Most of the increase resulted from larger exports to Canada, the best customer for our apples. Exports to Canada at 53 million pounds were up almost one-third and accounted for one-half of total U.S. exports. A substantial increase in exports to Europe, approximately 13 percent, was reported as the 1974 apple crop in the European Community was forecast at 24 percent smaller than 1973. Thus, our apple exports to such historically prominent markets as the United Kingdom and West Germany are likely to continue good. However, apple exports to other areas outside Canada and Europe declined 8 percent from last season and accounted for 41 percent of our total exports compared with 49 percent a year ago.

During July-December 1974, U.S. imports of fresh apples totaled above 22.5 million pounds, down almost one-third from last season. A substantial decline from Canada was chiefly responsible for the decrease. However, our apple imports from New Zealand, our second largest supplier after Canada, were also down sharply, three-fourths from last season.

Grapes

1974 Crop Up Slightly

The U.S. 1974 grape crop is estimated at 4.2 million tons, up slightly from the large 1973 crop and 63 percent more than the 2.6 million ton crop two years ago. This is the second largest crop on record and the highest production since the 4.3 million tons of 1965.

California's output of 3.8 million tons was off 3 percent from 1973 and accounted for nine-tenths of the total 1974 crop, but still 67 percent above 1972 frost-damaged crop. The decrease was entirely caused by a smaller crop of raisin varieties. Output of raisin variety grapes at 2 million tons was down 18 percent and decreased its share of the California crop from 61 to 52 percent. Harvest of table varieties at 617,000 tons increased 30 percent and accounted for 16 percent of the crop, compared with 12 percent in 1973. Wine variety production rose due to new bearing acreage and set a new record at 1.2 million tons, an increase of 17 percent over 1973 and represented almost one-third of the crop.

Grape production in other States totaled 405,100 tons, almost one-third over the 1973 small crop with larger crops reported for all major producing States.

Over half of the U.S. grape crop is crushed for wine—about 57 percent of last year's utilized production. In California about 96 percent of the wine varieties were crushed during the last two seasons and the remainder was shipped fresh. In addition, more than half of California's table varieties were crushed for wine last season. However, only 38 percent of California's raisin varieties were crushed for wine in 1974/75 season, compared with 51 percent a year earlier. The smaller tonnage of raisin varieties crushed for wine was due primarily to the record wine grape crop and larger inventories of wine. Raisin production, the second most important outlet for grapes, utilized 24 percent of the 1974 U.S. grape crop, slightly more than a year ago. Fresh usage represented slightly more than one-tenth of the U.S. grape crop while the remaining 8 percent was used for canning, juice, jam, jelly, etc.

About 2.3 million tons of the 1974 California grape crop were crushed for wine through late January, down moderately from a year ago. Total shipments of wine from California for the first 11 months of 1974 have reached 225 million gallons, up slightly from the corresponding period a year ago. This was a much slower rate of increase than that of the last several years. New crop wine is generally not ready for shipment before January. Prices for bulk wine have been decreasing and in mid-February were generally 20-40 percent below a year ago.

Grower Prices Lower

The 1974 U.S. average grape price received by growers was prelimarily estimated at $145 per ton, down from $162 per ton in 1973. As expected, prices varied greatly by producing area, variety of grape, and use. For example, last season prices were $720 per ton in Arizona (primarily for fresh market) but averaged $250 per ton for California grapes utilized fresh. The average price received by grape growers in California was $137 per ton, down 13 percent from a year ago as lower prices were recorded for all varietial types. The most significant decline in prices was for wine varieties which averaged $146 versus $207 per ton a year earlier.

Fresh grape shipments from California through mid-February this season totaled nearly 19,700 carlot equivalents, up slightly from a year earlier. In mid-February, shipping point prices for Emperor f.o.b.

Central San Joaquin Valley, California were reported at $5.00 per 23-pound lug. This compares with $4.67 a year earlier. Fresh prices are expected to remain above year-earlier levels for the remainder of the season in view of the smaller February 1 stocks, mostly Emperor, down 14 percent from a year earlier.

Pears

Total Crop Down Slightly from 1973

Total utilized production of pears in 1974 was 710,340 tons, a decrease of 2 percent from the large 1973 crop, but a 17 percent gain over the small 1972 crop. The smaller crop in the West more than offset the large crops in the East and Michigan. Utilized production in the Western States at 681,240 tons, accounting for 96 percent of the U.S. crop, was off 2 percent from 1973 with declines reported for all the States except Washington.

Utilized production of Bartletts in the Pacific Coast States during 1974 totaled 486,500 tons, 5 percent below 1973. Utilized production of other varieties at 185,900 tons, was 8 percent above last year's crop and accounted for 26 percent of the pear crop, compared with 24 percent last year.

Despite a smaller crop, utilization of pears for processing in 1974 increased slightly from year-earlier levels. Processing use accounted for 59 percent of the pear crop, compared with 58 percent a year ago. The slight increase in processing use is attributed to the larger quantity of Bartletts processed, while fresh use of Bartletts was down almost one-fourth from 1973. Processing use of Barletts in the Pacific Coast States accounted for 79 percent of the crop in 1974, compared with 74 percent last season. However, the proportion of utilization for other varieties in the Pacific Coast States between fresh and processing during 1974 was almost the same as 1973.

Stocks Moderately Larger

A moderately larger harvest of winter pears on the Pacific Coast last fall has resulted in sharply larger storage stocks. The combined production of pears other than Bartletts in Oregon and Washington was estimated at 172,000 tons, 6 percent more than the 1973 output. Cold storage stocks of the "Other Varieties", mostly D'Anjou and Bosc, in cold storage at the beginning of February were 130 million pounds, 43 percent above a year earlier.

Because of larger supplies f.o.b. prices for U.S. No. #1 D'Anjou pears at Yakima, Washington have been below year-earlier levels since late November. In mid-February, f.o.b. prices were quoted at $6.25 per box, compared with $6.88 a year ago. Demand for fresh pears appears to be lagging this season. Through mid-February this season, total fresh pear unloads in 41 major markets were 17 percent less than a year earlier. Even with larger cold storage holdings, fresh pear prices may advance seasonally but are likely to continue below year-earlier levels for the balance of the marketing season. With early season prices above year earlier levels, the U.S. season average price to growers for the 1974 fresh pear crop has been tentatively estimated at $187 per ton, compared with $160 in 1973. Average grower prices for pears for processing use (except dried) are estimated at $166 per ton in 1974, compared with $121 in 1973. However, average prices for Bartlett pears from the Pacific Coast States are estimated sharply above a year earlier. Bartlett pear prices by uses compared with 1973 were as follows; fresh $193 per ton, up 42 percent; canned $177 per ton, up 40 percent; processed except dried $174 per ton, up 38 percent; and all uses ;178 per ton, up 37 percent.

Foreign Trade Lagging

U.S. exports of fresh pears during July-December 1974 were about 54 million pounds, one-fifth less than in the same period in 1973, most of the decrease was accounted for by Europe and Canada, the largest foreign buyer of U.S. fresh pears. Exports to Canada amounted to 25 million pounds, down one-fourth from last season, as their pear production was substantially above the small 1973 crop. However, fresh pears exported to other parts of the world increased 12 percent from 1973.

Imports of fresh pears during 1974 were 21 million pounds, a decrease of 35 percent from 1973. Traditionally Australia is our major supplier, but during 1974 total imports from Australia were considerably below year-earlier levels.

Strawberries

Crop Up in 1974

Despite the smaller harvested acreage, U.S. commercial strawberry production during 1974 totaled 533 million pounds. This was 12 percent above a year earlier and the largest output since 1964. Production showed a mixed trend among States, but the biggest gain was in California last season. The larger California crop reflected larger harvested acreage and improved yields as a result of improved cultural practice and varieties, supplemented by ideal growing conditions in 1974. The average yield per acre was up nearly one-tenth from 1973. California, continuing to increase its share of U.S. strawberry production, accounted for almost three-fourths of the 1974 U.S. crop. Larger production was also recorded for Michigan and Washington with increases of 18 and 5 percent from 1973, respectively. On the other hand Oregon's crop was down 15 percent from 1973, reflecting both reduced acreage and lower yield.

As a result of larger production, U.S. strawberry supplies for both fresh market and processing were up from 1973. Fresh market use was 16 percent above last year while the processing utilization increased only 3 percent. About 68 percent of the 1974 crop went

to the fresh market, compared with 66 percent in 1973. In spite of a larger crop the average U.S. grower price for U.S. strawberries in 1974 was $28.60 per hundredweight (cwt.), up almost 4 percent from year-earlier levels since a larger portion of the crop moved to the higher priced fresh market outlet. Grower prices for fresh strawberries increased from $31.00 to $32.30 per cwt. while those for processed uses declined from $21.00 to $20.70 per cwt. between 1974 and 1973.

Current indications are that the 1975 Florida winter strawberry crop is in good condition. Light harvest is underway in some areas. Normally Florida's winter crop accounts for less than 5 percent of U.S. production. The current estimate is for a harvest of 1,100 acres, down 200 acres from 1974. Unless the yield improves substantially above levels of the last three seasons, the 1975 Florida strawberry crop will be substantially smaller. However, so far this season through mid-February total shipments of fresh strawberries from Florida have been sharply above year-earlier levels. Opening f.o.b. prices for Florida strawberries were substantially above the high levels of a year earlier, but mid-February shipping point prices have declined to $5.12 per 12-pint flat, various varieties. This was still one-fifth above last year. Prices will continue to decline seasonally with increased volume.

Imports Up

The following table shows data in U.S. imports of fresh and frozen strawberries for the past five seasons. Most imports for both items originate in Mexico. After declining steadily during the last two years, imports of fresh strawberries during 1974 were about 43.7 million pounds, up 12 percent from 1973. U.S. imports of frozen strawberries in continuation of upward trend reached another record large 117.1 million pounds, 3 percent above 1973.

U.S. strawberry imports

January-December	Fresh	Frozen
	Million pounds	*Million pounds*
1969	46.5	93.0
1970	51.1	109.7
1971	51.3	84.6
1972	43.2	85.2
1973	38.9	113.7
1974	43.7	117.1

Bananas

U.S. imports of bananas during 1974 totaled 4.4 billion pounds, an increase of 3 percent from the previous year. After the September 1974 hurricane Fifi damaged banana plantations in Honduras, our banana imports from there were down sharply. Thus, Honduras supplies only 27 percent of our bananas in 1974, compared with 35 percent a year ago. The substantial decrease in banana imports from Honduras since the hurricane was more than offset by increases from other Latin American countries, particularly Costa Rica, Ecuador, and Columbia. Smaller supplies from Honduras are expected through the first half of 1975.

As a result of taxes imposed on banana exports to the United States, higher marketing costs, and the monthly variations in available supplies, the 1974 retail banana prices fluctuated widely. Prices ranged from the low of 14.2 cents per pound in March to a high of 24.1 cents in October and were above 1973 levels every month with the exception of March and April. In January 1975 retail banana prices averaged 19.3 cents per pound, compared with 16.6 cents a year ago.

PROCESSED NONCITRUS

Despite a smaller carryover, the 1974/75 supply of processed noncitrus items is larger than a year ago. Total canned and frozen fruit packs are expected to be larger, while dried fruit output will be below last season. Nevertheless, packers' selling prices have been raised, reflecting the higher costs for raw products, marketing, and processing.

Reflecting higher packers' selling prices, retail prices of most processed noncitrus products have been above a year ago. With higher prices, movement of processed noncitrus has weakened in both domestic and foreign markets. Thus, slackening movement combined with larger supplies are likely to result in relatively stable prices for most processed noncitrus fruit items during the months ahead.

Canned

1974/75 Canned Pack Up Substantially

The 1974/75 U.S. pack of canned noncitrus fruit will be substantially larger than in 1973/74. The larger pack is mainly a result of the increased production of several leading processing fruits. Completed packs of leading canned fruit items reported to data are above a year ago except for apricots and purple plums.

At 30.4 million cases, the 1974 U.S. canned clingstone peach pack (basis 24/2½'s) was up almost one-third from 1973. However, canned fruit cocktail and canned pear packs, the two other leading items, were up only slightly from the previous year.

The 1974/75 pack of canned applies and applesauce is likely to be larger than in 1973/74. The packing season for these two items continues into the spring, but most canning is usually done before January 1. Through the first of the year, the pack of applesauce was running 19 percent ahead of a year earlier, while output of canned apples was up only slightly. The larger pack of canned apple products this season is attributed to the larger apple crop from the Eastern and Central regions. Although the final apple pack data will not be available until September, total pack of canned apple items for this season is likely to be above last season in view of the larger remaining supplies of apples in cold storages.

Packing of canned pineapple also continues through spring; for the first 6 months of the 1974/75 season, the pack was running considerably behind a year ago.

Supplies Substantially Larger

Total supplies of canned fruit for the 1974/75 marketing season are considerably above those a year ago as the larger pack more than offset a substantially smaller carryover at the beginning of the season. Shipments of canned fruit so far this season have been generally slow as demand has weakened in both domestic and foreign markets. Thus, available data for canned noncitrus items indicate January 1, 1975, stocks were more than one-third larger than a year ago.

Even with substantial increases in shipments, stocks of canned Clingstone and Freestone peaches as of January 1, 1975, were two-thirds and one-fifth above a year ago, respectively. Supplies of fruit cocktail available for the remainder of the season were more than one-fifth larger. With total supplies of canned pears almost the same as a year ago, January 1 stocks were one-fifth larger, reflecting substantially reduced movement. The inventory of canned tart cherries on January 1 was sharply above the nearly depleted stocks of a year ago because of the substantially larger crop this season. Stocks of canned sweet cherries were also sharply larger but due primarily to the reduced shipments. In spite of moderately larger shipments, January 1 stocks of canned purple plums were slightly above year-earlier levels since the carryin was almost three times larger than the previous season's negligible carryin. However, the inventories of canned apricots were less than half of the last year's as a result of the sharply reduced pack.

The total supply of canned applesauce to January 1, 1975 (carryover plus pack) was considerably above a year ago due to larger carryover and pack. With shipments to January 1 running 14 percent below a year earlier, January 1 stocks of canned applesauce were 55 percent larger than last year. Likewise, total supply of canned apples to January 1 was also substantially above a year ago due mainly to larger carryin, while the pack was only up slightly. With shipments to January 1 down 13 percent, January 1 stocks of canned apples were three-fourths above year-earlier levels. In contrast, stocks of canned pineapples as of January 1 were sharply lower as a result of smaller carryin and pack.

Despite a larger supply, f.o.b. prices for most canned fruits have been substantially above a year earlier, reflecting higher costs for raw products, processing, and marketing. The higher wholesale prices have also been reflected at retail levels. These higher prices, combined with a slowdown in economic activity here and abroad, caused movement of canned fruit to weaken in both domestic and foreign markets. In order to stimulate movement, canners have offered promotion allowances for most canned fruits in recent weeks. The BLS index of wholesale canned fruit prices peaked at 170.5 (1967=100) in November 1974. It declined to 170.4 in December and remained at that level in January 1975, but was still 26 percent above a year ago. With substantially larger stocks of most canned fruits on hand and weakening demand, wholesale prices are likely to remain relatively stable during the months ahead.

Exports Down Sharply

Led by a sharp decrease in exports to Europe, U.S. aggregate exports of canned noncitrus fruit during June-December 1974 were almost one-third below those of the comparable period of 1973. Europe took 1.6 million cases (equiv. 24/2½'s), only half of last year's volume. This represented only 46 percent of total U.S. exports, compared with 61 percent a year ago. A slowdown in economic activity in Europe combined with higher prices of canned fruits have generally contributed to the sharp decline. Exports to other parts of the world besides Canada and Europe, normally a very small portion, also fell sharply from 13 to 8 percent between 1973 and 1974. However, with 18 percent larger receipts, Canada's share of our total canned noncitrus fruit exports increased to 46 percent from 26 percent a year ago.

Frozen

The total supply of frozen noncitrus fruits and berries in cold storage as of February 1 was substantially above the year-earlier volume. Large increases were recorded for most of the items.

Strawberries are the leading frozen fruit. The 105 million pounds of strawberries delivered to processors by California growers during the 1974 season was the largest since 1958. The increase has accounted for 65 percent of the total U.S. strawberry freezer pack. California's pack of 105 million pounds utilized 28 percent of the 1974 total California strawberry crop. In addition, another record-breaking volume of frozen strawberries was imported from Mexico in 1974. Imports amounted to 117

Frozen fruit cold storage holdings

Commodity	February 1		
	1973	1974	1975
	1,000 pounds	*1,000 pounds*	*1,000 pounds*
Apples	67,464	74,677	85,963
Apricots	9,494	9,051	8,795
Cherries	81,176	44,228	67,908
Grapes	4,899	4,604	5,820
Peaches	25,792	43,115	42,638
Blackberries	11,799	7,849	13,505
Blueberries	20,689	34,025	33,427
Boysenberries	2,869	3,108	3,654
Raspberries, black	864	1,244	1,330
Raspberries, red	10,465	12,941	15,078
Strawberries	92,704	106,724	128,374
Other fruits and berries	152,739	157,803	154,848
Total	480,954	499,369	561,340

million pounds in 1974, up 3 percent from 1973. As a result, storage stocks of frozen strawberries on February 1 were up almost one-fifth from a year ago. Wholesale prices of frozen strawberries have held relatively steady since last September at $4.21 per doz. 10 oz. packages, but still one-tenth above the dame period a year ago.

Stocks of frozen apples as of February 1 were also substantially larger than last year, reflecting the larger crop from the Eastern and Central States. With the packing season still in progress, the total season supply of frozen apples will be ample. Reflecting a substantially larger pack in the Midwest and slow movement, cold storage stocks of red cherries were 54 percent above the small stocks a year earlier. Sharply larger stocks were also reported for frozen blackberries and red raspberries.

Inventories of frozen fruits will decline from now until late spring, when new-season packing activity begins. Storage of frozen fruits normally reach a seasonal peak in the fall.

Dried

U.S. dried fruit production in 1974/75 was moderately below that of the preceding season. A substantial decrease in dried prune production is chiefly responsible.

Production of California dried prunes, estimated at 138,000 tons, is almost one-third below the 1973 output, the largest since 1946. At 11,900 tons, dried fig output was 5 percent smaller than in 1973. Total raisin output for 1974 at 240,000 tons, an increase of 7 percent from 1973, was not sufficient to offset the decrease in production of dried prunes and figs.

Despite a sharply larger carryin at the beginning of the season, total supplies of dried prunes for the 1974/75 season were moderately smaller than the preceding season. Total dried prune shipments through January 1975 (August 1974-January 1975) were running more than one-third below the same period in 1974 when the trade was rebuilding stocks and Yugoslavia had a near crop failure. Shipments to domestic markets were running one-third below a year ago, while exports were down 45 percent. Although the movement was smaller, the remaining supply of dried prunes at the end of January 1975 was at 113,769 tons (processed conditions), slightly larger than the preceding year.

With a larger carryover and pack, total supplies of raisin are larger. Total raisin shipments through January 1975 (September 1974-January 1975) were running substantially less. This is in contrast to last season when the carryover stocks of raisins were negligible and the packers were busy attempting to fill the market pipelines. Domestic shipments were down almost one-fourth, while exports declined more severely, almost one-half of last year's volume.

With a large supply and slackening demand, the BLS wholesale price of dried prunes has been below year-earlier levels at $9.57 per case (24/1 pound) since last October. The average grower price for 1974 has been estimated at $460 per ton (dried basis), only $2 less than 1973. In January 1975 the average BLS wholesale price of raisins was at $11.65 per case (24/15 oz.), about 4 percent below a year ago. The 1974 season average price received by growers was estimated at $632 per ton (dried basis processing plant door), down 16 percent from the preceding season. Because of slow movements, some processors have offered promotion allowances in recent weeks. Thus, with large supplies of dried fruits, f.o.b. prices are likely to remain stable at the levels below a year ago for the balance of the season.

The U.S. Department of Agriculture has approved a recommended increase in the salable percentage of 1974 prune production for regular channels. Volume regulations increased the salable percentage to 90 percent of the production instead of 82 percent announced previously. The 10 percent reserve will be available to satisfy additional demand, develop new markets, and augment regular supplies if market conditions warrant it later in the season. USDA has also proposed final allocations for the 1974 crop of natural Thompson seedless raisins; 27 percent of the raisin crop for reserve to be sold mainly in export markets and 73 percent free tonnage to be available for sale in U.S. and other Western Hemisphere markets, primarily Canada.

TREE NUTS

Production for 5 major domestic tree nuts has been estimated at 424 thousand tons. This is 9 percent below the year-earlier level, but 21 percent above the 1972 harvest. Walnuts, pecans and filberts registered declines from last season while almonds and macadamia nuts increased. The value of utilized

production for those 5 edible tree nuts at 305 million dollars was 27 percent below 1973.

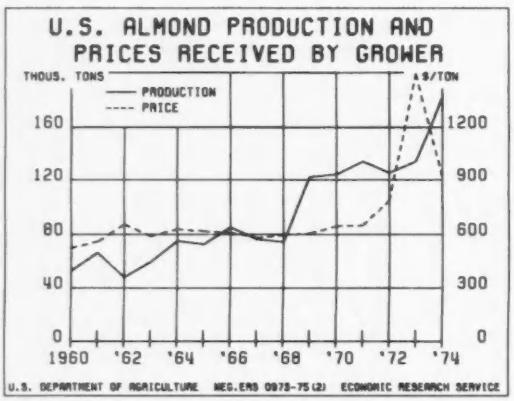
Almonds

The 1974 California almond crop estimated at 182,000 tons (in-shell basis), produced 225 million pounds of shelled meats. This was substantially more than the 155 million pounds of shelled meats produced last season. Domestic movement during the first 7 months of this season (July-January) was 3 percent below a year ago. The decline in shipments of shelled products more than offset the sharp increases of unshelled items, which represented a relatively small share of the market.

According to the Almond Control Board, total export shipments of shelled almonds during the first 7 months of the season at 66.2 million pounds were 24 percent above the same period last season. Exports to Western Europe totaled 54.5 million pounds, compared to 31.3 million during the comparable period in 1973/74. West Germany continued as the major destination with 28.7 million pounds moving to that market. On the other hand, shipments to Japan are off more than 15 million pounds so far this season.

Unless domestic and foreign movement increase substantially during the months ahead, the carryout at the end of the season will be sharply higher than the 30.9 million pounds (kernel weight) last season.

The U.S. season average price to growers for the 1974 crop has been estimated at $920 per ton,



compared with the unusual high of $1,490 a year ago and $785 for the 1972 crop.

Pecans

Production during 1974 was estimated at 71,700 tons, 48 percent less than 1973 and 22 percent below 1972. The output of improved varieties was 39 percent smaller while native and seedling harvest was off 58 percent. In spite of the smaller crop, cold storage holdings of both shelled and in-shell pecans on February 1 were considerably above year-earlier levels.

As a result of the smaller crops, prices have been sharply higher. The U.S. season average price to growers for improved varieties is estimated at 52.4 cents per pound, compared with 42.6 cents last season. Grower returns for the native and seedling crop at 38.6 cents per pound was 27 percent above the previous season's average.

Walnuts

U.S. production of walnuts during 1974 was estimated at 156,000 tons, down 11 percent from last season's large crop. Total walnut shipments for the first 6 months of this season (August-January) were about 15 percent larger than a year ago. Exports of in-shell walnuts to Europe have strengthened in recent weeks. In view of the smaller crops in Italy and France, exports could remain strong for the rest of this marketing season.

As of January 1, 1975, unsold inventories held by walnut handlers included 10,143 tons in-shell and 23,883 tons shelled. A year ago the unsold stocks included 20,009 tons in-shell and 19,278 tons shelled. The 1974 season average price to growers is tentatively estimated at $400 per ton (in-shell), compared with $605 for the 1973 crop and $564 in 1972.

Other Tree Nuts

Filbert output has been set at 6,700 tons, 45 percent below 1973. The 1974 season average price to growers was estimated at $540 per ton, compared with $592 last season.

Macadamia nut production is listed at 6,875 tons, up 13 percent from 1973. Despite the larger crop, grower returns increased to 29 cents per pound, from 25.5 in 1973.

GEOGRAPHIC DISTRIBUTION OF FRUIT AND NUT PRODUCTION, 1973

Data on 1973 production and value of fruit and tree nuts grown in the U.S. are included in tables 1-3 in this issue.

About 25 million tons of fruit were harvested in 1973 with a total value of $3 billion. Noncitrus fruit production accounted for 44 percent of the U.S. total fruit tonnage but 69 percent of the total value. Leading crops to order of value were grapes at $680 million, oranges at $603 million, apples at $546 million, and peaches at $203 million.

California accounted for 36 percent of U.S. fruit tonnage produced and 46 percent of total value. However, Florida produced 41 percent of our fruit crop but accounted for 21 percent of total value.

Edible tree nut production at 465,162 tons, had a total value of $417 million. California was the leading producer and accounted for two-thirds of the output and 73 percent of the total U.S. value.

Complete data for the 1974 season is not currently available but will be published in the September 1975 Fruit Situation.

Table 1—Fruit and edible tree nuts: Utilized production by States, United States, 1973

State	Noncitrus fruits												
	Apples	Apricots	Cherries		Cranberries	Grapes	Peaches	Pears	Prunes and plums	Strawberries	Other[1]	Total	
			Sweet	Tart								Quantity[6]	Percent of U.S.
	1,000 tons	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*Percent*
Maine	27.5	---	---	---	---	---	---	---	---	---	---	27.5	0.2
N.H.	22.0	---	---	---	---	---	---	---	---	---	---	22.0	.2
Vt.	14.0	---	---	---	---	---	---	---	---	---	---	14.0	.1
Mass.	38.0	---	---	---	45.0	---	2.0	---	---	0.5	---	85.5	.8
R.I.	2.0	---	---	---	---	---	---	---	---	---	---	2.0	(7)
Conn.	15.0	---	---	---	---	---	2.2	1.5	---	---	---	18.7	.2
N.Y.	360.0	---	3.4	10.2	---	128.0	7.5	12.6	---	2.2	---	523.9	4.7
N.J.	50.0	---	---	---	11.4	1.0	46.0	---	---	2.3	---	110.7	1.0
Pa.	250.0	---	.7	3.2	---	40.0	40.5	1.8	---	2.1	---	338.3	3.1
Ohio	50.0	---	---	.2	---	13.0	2.5	---	---	2.1	---	67.8	.6
Ind.	31.5	---	---	---	---	---	1.8	---	---	1.0	---	34.3	.3
Ill.	41.5	---	---	---	---	---	3.5	---	---	1.6	---	46.6	.4
Mich.	235.0	---	16.0	58.0	---	23.5	25.0	9.5	18.0	7.5	---	392.5	3.5
Wis.	25.0	---	---	2.4	33.5	---	---	---	---	1.9	---	62.8	.6
Minn.	10.0	---	---	---	---	---	---	---	---	---	---	10.0	.1
Iowa	5.2	---	---	---	---	---	---	---	---	---	---	5.2	(7)
Mo.	25.5	---	---	---	---	1.8	4.0	---	---	1.0	---	32.3	.3
Kans.	7.5	---	---	---	---	---	5.0	---	---	---	---	12.5	.1
Del.	6.0	---	---	---	---	---	1.4	---	---	---	---	7.4	.1
Md.	35.0	---	---	---	---	---	7.4	---	---	.8	---	43.2	.4
Va.	200.0	---	---	---	---	---	10.0	---	---	.6	---	210.6	1.9
W. Va.	112.5	---	---	---	---	---	8.0	---	---	---	---	120.5	1.1
N.C.	105.0	---	---	---	---	3.4	15.0	---	---	3.4	---	126.8	1.1
S.C.	8.5	---	---	---	---	[2]6.6	122.5	---	---	---	---	137.6	1.2
Ga.	---	---	---	---	---	---	50.0	---	---	---	---	50.0	.5
Fla.	---	---	---	---	---	---	---	---	---	9.4	20.3	29.7	.3
Ky.	4.9	---	---	---	---	---	2.0	---	---	.8	---	7.7	.1
Tenn.	1.6	---	---	---	---	---	1.8	---	---	.8	---	4.2	(7)
Ala.	---	---	---	---	---	---	3.5	---	---	---	---	3.5	(7)
Miss.	---	---	---	---	---	---	5.0	---	---	---	---	5.0	(7)
Ark.	3.0	---	---	---	---	8.0	18.0	---	---	1.4	---	30.4	.3
La.	---	---	---	---	---	---	3.2	---	---	3.0	---	6.2	.1
Okla.	---	---	---	---	---	---	4.6	---	---	1.2	---	5.8	(7)
Texas	---	---	---	---	---	---	7.5	---	---	---	---	7.5	.1
Mont.	---	---	2.5	---	---	---	---	---	---	---	---	2.5	(7)
Idaho	65.0	---	1.5	---	---	---	.4	1.3	8.0	---	---	76.2	.7
Colo.	57.5	---	.6	1.0	---	---	11.6	---	---	---	---	76.2	.7
N. Mex.	19.0	---	---	---	---	---	---	---	---	---	---	19.0	.2
Ariz.	---	---	---	---	---	11.6	---	---	---	---	---	11.6	.1
Utah	26.3	2.2	6.5	8.5	---	---	6.0	5.8	---	---	---	55.3	.5
Wash.	930.0	3.5	45.5	---	5.9	69.2	21.5	187.3	14.7	10.8	10.0	1,298.4	11.7
Ore.	83.5	---	37.0	3.6	4.9	---	6.0	171.0	25.8	24.2	11.6	367.6	3.3
Calif.	245.0	152.0	40.0	---	---	3,887.0	776.0	327.3	691.5	160.0	282.7	6,561.5	59.2
Hawaii	---	---	---	---	---	---	---	---	---	---	20.0	20.0	.2
U.S.	3,112.5	157.7	153.6	87.0	100.7	4,193.2	1,221.4	723.6	758.0	238.6	344.6	11,090.9	100.0

See footnotes at end of table.

--Continued.

Table 1—Fruit and edible tree nuts: Utilized production, by States, United States, 1973—Continued

State	Citrus fruits[3]						Total all fruits		Tree nuts				Total all fruits and tree nuts	
	Oranges	Grapefruit	Lemons	Other[4]	Total		Quantity[6]	Percent of U.S.[5]	Pecans	Other[5]	Total		Quantity[6]	Percent of U.S.[6]
					Quantity	Percent of U.S.					Quantity	Percent of U.S.[6]		
	1,000 tons	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*Percent*	*1,000 tons*	*Percent*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*Percent*	*1,000 tons*	*Percent*
Maine	---	---	---	---	---	---	27.5	0.1	---	---	---	---	27.5	0.1
N.H.	---	---	---	---	---	---	22.0	.1	---	---	---	---	22.0	.1
Vt.	---	---	---	---	---	---	14.0	.1	---	---	---	---	14.0	.1
Mass.	---	---	---	---	---	---	85.5	.3	---	---	---	---	85.5	.3
R.I.	---	---	---	---	---	---	2.0	(7)	---	---	---	---	2.0	(7)
Conn.	---	---	---	---	---	---	18.7	.1	---	---	---	---	18.7	.1
N.Y.	---	---	---	---	---	---	523.9	2.1	---	---	---	---	523.9	2.1
N.J.	---	---	---	---	---	---	110.7	.4	---	---	---	---	110.7	.4
Pa.	---	---	---	---	---	---	338.3	1.4	---	---	---	---	338.3	1.3
Ohio	---	---	---	---	---	---	67.8	.3	---	---	---	---	67.8	.3
Ind.	---	---	---	---	---	---	34.3	.1	---	---	---	---	34.3	.1
Ill.	---	---	---	---	---	---	46.6	.2	---	---	---	---	46.6	.2
Mich.	---	---	---	---	---	---	392.5	1.6	---	---	---	---	392.5	1.5
Wis.	---	---	---	---	---	---	62.8	.3	---	---	---	---	62.8	.2
Minn.	---	---	---	---	---	---	10.0	(7)	---	---	---	---	10.0	(7)
Iowa	---	---	---	---	---	---	5.2	(7)	---	---	---	---	5.2	(7)
Mo.	---	---	---	---	---	---	32.3	.1	---	---	---	---	32.3	.1
Kans.	---	---	---	---	---	---	12.5	(7)	---	---	---	---	12.5	(7)
Del.	---	---	---	---	---	---	7.4	(7)	---	---	---	---	7.4	(7)
Md.	---	---	---	---	---	---	43.2	.2	---	---	---	---	43.2	.2
Va.	---	---	---	---	---	---	210.6	.8	---	---	---	---	210.6	.8
W. Va.	---	---	---	---	---	---	120.5	.5	---	---	---	---	120.5	.5
N.C.	---	---	---	---	---	---	126.8	.5	0.8	---	0.8	0.2	127.6	.5
S.C.	---	---	---	---	---	---	137.6	.6	1.0	---	1.0	.2	138.6	.5
Ga.	---	---	---	---	---	---	50.0	.2	50.0	---	50.0	10.7	100.0	.4
Fla.	7,637.0	1,930.0	---	556.5	10,123.5	72.8	10,153.2	40.6	3.3	---	3.3	.7	10,156.5	39.9
Ky.	---	---	---	---	---	---	7.7	(7)	---	---	---	---	7.7	(7)
Tenn.	---	---	---	---	---	---	4.2	(7)	---	---	---	---	4.2	(7)
Ala.	---	---	---	---	---	---	3.5	(7)	20.5	---	20.5	4.4	24.0	.1
Miss.	---	---	---	---	---	---	5.0	(7)	11.0	---	11.0	2.4	16.0	.1
Ark.	---	---	---	---	---	---	30.4	.1	3.0	---	3.0	.6	33.4	.1
La.	---	---	---	---	---	---	6.2	(7)	20.0	---	20.0	4.3	26.2	.1
Okla.	---	---	---	---	---	---	5.8	(7)	14.0	---	14.0	3.0	19.8	.1
Texas	331.6	472.0	---	---	803.6	5.8	811.1	3.2	10.0	---	10.0	2.2	821.0	3.2
Mont.	---	---	---	---	---	---	2.5	(7)	---	---	---	---	2.5	(7)
Idaho	---	---	---	---	---	---	76.2	.3	---	---	---	---	76.2	.3
Colo.	---	---	---	---	---	---	76.2	.3	---	---	---	---	76.2	.3
N. Mex.	---	---	---	---	---	---	19.0	.1	4.2	---	4.2	.9	23.2	.1
Ariz.	189.8	84.5	175.0	19.9	469.2	3.4	480.8	1.9	---	---	---	---	480.8	1.9
Utah	---	---	---	---	---	---	55.3	.2	---	---	---	---	55.3	.2
Wash.	---	---	---	---	---	---	1,298.4	5.2	---	.6	.6	.1	1,299.0	5.1
Ore.	---	---	---	---	---	---	367.6	1.5	---	12.7	12.7	2.7	380.3	1.5
Calif.	1,579.0	189.8	669.0	60.0	2,497.8	18.0	9,059.3	36.3	---	308.0	308.0	66.2	9,367.3	36.8
Hawaii	---	---	---	---	---	---	20.0	.1	---	6.1	6.1	1.3	26.1	.1
U.S.	9,737.4	2,676.3	844.0	636.4	13,894.1	100.0	24,985.0	100.0	137.8	327.3	465.2	100.0	25,450.2	100.0

[1] Avocado 1973/74 crop, bananas, bushberries, dates, figs, nectarines, olives, papayas, persimmons, and pomegranates.

[2] Includes Georgia. [3] 1972/73 crop. [4] Tangerines, limes, tangelos, and temples. [5] Almonds, filberts, Macadamia nuts and walnuts.

[6] Does not add due to rounding. [7] Less than 0.05 percent.

Table 2—Fruit and edible tree nuts: Value of production, by States, United States, 1973

State	Noncitrus fruits												
	Apples	Apricots	Cherries		Cranberries	Grapes	Peaches	Pears	Prunes and plums	Strawberries	Other[1]	Total	
			Sweet	Tart								Value	Percent of U.S.[4]
	1,000 dollars	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*Percent*
Maine	7,315	---	---	---	---	---	---	---	---	---	---	7,315	0.4
N.H.	5,984	---	---	---	---	---	---	---	---	---	---	5,984	.3
Vt.	3,584	---	---	---	---	---	---	---	---	---	---	3,584	.2
Mass.	10,108	---	---	---	12,254	---	800	---	---	462	---	23,624	1.1
R.I.	544	---	---	---	---	---	---	---	---	---	---	544	([7])
Conn.	3,900	---	---	---	---	---	855	450	---	---	---	5,205	.2
N.Y.	69,840	---	1,166	3,611	---	28,288	2,385	2,092	---	1,310	—	108,692	5.2
N.J.	9,500	---	---	---	3,124	217	12,788	---	---	1,550	---	27,179	1.3
Pa.	43,000	---	422	1,244	---	8,840	9,153	414	---	1,974	---	65,047	3.1
Ohio	11,200	---	---	80	---	2,847	850	---	---	1,231	---	16,208	.8
Ind.	6,615	---	---	---	---	---	700	---	---	699	---	8,014	.4
Ill.	7,470	---	---	---	---	---	889	---	---	890	---	9,249	.4
Mich.	43,710	---	4,480	22,620	---	4,630	5,750	1,463	2,214	4,723	---	89,590	4.3
Wis.	6,100	---	---	994	10,050	---	---	---	---	1,379	---	18,523	.9
Minn.	2,480	---	---	---	---	---	---	---	---	---	---	2,480	.1
Iowa	1,290	---	---	---	---	---	---	---	---	---	---	1,290	.1
Mo.	5,712	---	---	---	---	358	1,336	---	---	604	---	8,010	.4
Kans.	1,110	---	---	---	---	---	1,120	---	---	---	---	2,230	.1
Del.	1,056	---	---	---	---	---	305	---	---	---	---	1,361	.1
Md.	6,650	---	---	---	---	---	1,808	---	---	508	---	8,966	.4
Va.	33,600	---	---	---	---	---	2,100	---	---	264	---	35,964	1.7
W. Va.	20,025	---	---	---	---	---	1,952	---	---	---	---	21,977	1.1
N.C.	13,440	---	---	---	---	1,132	3,390	---	---	2,385	---	20,347	1.0
S.C.	1,343	---	---	---	---	[2]1,553	28,175	---	---	---	---	31,071	1.5
Ga.	---	---	---	---	---	---	15,900	---	---	---	---	15,900	.8
Fla.	---	---	---	---	---	---	---	---	---	8,127	7,204	15,334	.7
Ky.	1,029	---	---	---	---	---	560	---	---	476	---	2,065	.1
Tenn.	301	---	---	---	---	---	407	---	---	507	---	1,215	.1
Ala.	---	---	---	---	---	---	1,057	---	---	---	---	1,057	.1
Miss.	---	---	---	---	---	---	1,460	---	---	---	---	1,460	.1
Ark.	528	---	---	---	---	1,600	4,248	---	---	1,102	---	7,478	.4
La.	---	---	---	---	---	---	1,008	---	---	1,989	---	2,997	.1
Okla.	---	---	---	---	---	---	1,058	---	---	789	---	1,847	.1
Texas	---	---	---	---	---	---	2,100	---	---	---	---	2,100	.1
Mont.	---	---	1,682	---	---	---	---	---	---	---	---	1,682	.1
Idaho	13,130	---	678	---	---	---	104	178	1,860	---	---	15,950	.8
Colo.	8,625	---	300	384	---	---	2,934	672	---	---	---	12,915	.6
N. Mex.	3,078	---	---	---	---	---	---	---	---	---	---	3,078	.1
Ariz.	---	---	---	---	---	5,278	---	---	---	---	---	5,278	.3
Utah	3,531	315	2,035	2,839	---	---	1,512	624	---	---	---	10,856	.5
Wash.	156,240	743	16,562	---	1,628	12,802	3,956	26,765	2,440	5,215	8,142	234,493	11.3
Ore.	10,855	---	11,470	1,004	1,323	---	1,560	23,829	3,302	11,578	11,855	76,776	3.7
Calif.	32,830	24,776	17,600	---	---	612,534	90,692	43,152	125,847	83,830	110,689	1,141,950	54.9
Hawaii	---	---	---	---	---	---	---	---	---	---	4,953	4,953	.2
U.S.	545,723	25,834	56,395	32,776	28,379	680,079	202,912	99,639	135,663	131,592	142,846	2,081,838	100.0

See footnotes at end of table

--Continued.

Table 2—Fruit and edible tree nuts: Value of production by States, United States, 1973—Continued

State	Citrus fruits[3]						Total all fruits		Tree nuts				Total of all fruit and tree nuts	
	Oranges	Grapefruit	Lemons	Other[4]	Total		Value	Percent of U.S.	Pecans	Other[5]	Total		Value	Percent of U.S.[6]
					Value	Percent of U.S.[6]					Value	Percent of U.S.[6]		
	1,000 dollars	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*Percent*	*1,000 dollars*	*Percent*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*	*Percent*	*1,000 dollars*	*Percent*
Maine	---	---	---	---	---	---	7,315	0.2	---	---	---	---	7,315	0.2
N.H.	---	---	---	---	---	---	5,984	.2	---	---	---	---	5,984	.2
Vt.	---	---	---	---	---	---	3,584	.1	---	---	---	---	3,584	.1
Mass.	---	---	---	---	---	---	23,624	.8	---	---	---	---	23,624	.7
R.I.	---	---	---	---	---	---	544	(7)	---	---	---	---	544	(7)
Conn.	---	---	---	---	---	---	5,205	.2	---	---	---	---	5,205	.2
N.Y.	---	---	---	---	---	---	108,692	3.6	---	---	---	---	108,692	3.2
N.J.	---	---	---	---	---	---	27,179	.9	---	---	---	---	27,179	.8
Pa.	---	---	---	---	---	---	65,047	2.2	---	---	---	---	65,047	1.9
Ohio	---	---	---	---	---	---	16,208	.5	---	---	---	---	16,208	.5
Ind.	---	---	---	---	---	---	8,014	.3	---	---	---	---	8,014	.2
Ill.	---	---	---	---	---	---	9,249	.3	---	---	---	---	9,249	.3
Mich.	---	---	---	---	---	---	89,590	3.0	---	---	---	---	89,590	2.6
Wis.	---	---	---	---	---	---	18,523	.6	---	---	---	---	18,523	.5
Minn.	---	---	---	---	---	---	2,480	.1	---	---	---	---	2,480	.1
Iowa	---	---	---	---	---	---	1,290	(7)	---	---	---	---	1,290	(7)
Mo.	---	---	---	---	---	---	8,010	.3	---	---	---	---	8,010	.2
Kans.	---	---	---	---	---	---	2,230	.1	---	---	---	---	2,230	.1
Del.	---	---	---	---	---	---	1,361	(7)	---	---	---	---	1,361	(7)
Md.	---	---	---	---	---	---	8,966	.3	---	---	---	---	8,966	.3
Va.	---	---	---	---	---	---	35,964	1.2	---	---	---	---	35,964	1.0
W. Va.	---	---	---	---	---	---	21,977	.7	---	---	---	---	21,977	.6
N.C.	---	---	---	---	---	---	20,347	.7	587	---	587	0.1	20,934	.6
S.C.	---	---	---	---	---	---	31,071	1.0	881	---	881	.2	31,952	.9
Ga.	---	---	---	---	---	---	15,900	.5	41,295	---	41,295	9.9	57,195	1.7
Fla.	443,172	130,620	---	42,488	616,280	66.4	631,614	21.0	2,169	---	2,169	.5	633,783	18.5
Ky.	---	---	---	---	---	---	2,065	.1	---	---	---	---	2,065	.1
Tenn.	---	---	---	---	---	---	1,215	(7)	---	---	---	---	1,215	(7)
Ala.	---	---	---	---	---	---	1,057	(7)	14,950	---	14,950	3.6	16,007	.5
Miss.	---	---	---	---	---	---	1,460	(7)	7,188	---	7,188	1.7	8,648	.3
Ark.	---	---	---	---	---	---	7,478	.2	2,060	---	2,060	.5	9,538	.3
La.	---	---	---	---	---	---	2,997	.1	11,780	---	11,780	2.8	14,777	.4
Okla.	---	---	---	---	---	---	1,847	.1	8,600	---	8,600	2.1	10,447	.3
Texas	12,324	25,370	---	---	37,694	4.1	39,794	1.3	7,625	---	7,625	1.8	47,419	1.4
Mont.	---	---	---	---	---	---	1,682	.1	---	---	---	---	1,682	(7)
Idaho	---	---	---	---	---	---	15,950	.5	---	---	---	---	15,950	.5
Colo.	---	---	---	---	---	---	12,915	.4	---	---	---	---	12,915	.4
N. Mex.	---	---	---	---	---	---	3,078	.1	4,080	---	4,080	1.0	7,158	.2
Ariz.	15,763	4,937	18,630	2,385	41,715	4.5	46,993	1.6	---	---	---	---	46,993	1.4
Utah	---	---	---	---	---	---	10,856	.4	---	---	---	---	10,856	.3
Wash.	---	---	---	---	---	---	234,493	7.8	---	349	349	.1	234,842	6.9
Ore.	---	---	---	---	---	---	76,776	2.6	---	7,453	7,453	1.8	84,229	2.5
Calif.	132,046	16,128	78,672	5,984	232,830	25.1	1,374,780	45.7	---	304,930	304,930	73.1	1,679,710	49.0
Hawaii	---	---	---	---	---	---	4,953	.2	---	3,092	3,092	.7	8,045	.2
U.S.	603,305	177,055	97,302	50,857	928,519	100.0	3,010,357	100.0	101,215	315,824	417,039	100.0	3,427,396	100.0

[1] Avocado 1972/73 crop, bananas, bushberries, dates, figs, nectarines, olives, papayas, persimmons, and pomegranates.

[2] Includes Georgia. [3] 1972/73 crop. [4] Tangerines, limes, tangelos, and temples. [5] Almonds, filberts, Macadamia nuts, and walnuts.

[6] Does not add due to rounding. [7] Less than 0.05 percent.

Table 3—Fruit and edible tree nuts: Utilized production and value, principal States and United States, 1973

State	Noncitrus fruits		Citrus fruits		All fruits		Tree nuts		All fruits and tree nuts	
	Production	Value	Production	Value	Production	Value	Production	Value	Production[1]	Value
	1,000 tons	*1,000 dollars*	*1,000 tons*	*1,000 dollars*	*1,000 tons*	*1,000 dollars*	*1,000 tons*	*1,000 dollars*	*1,000 tons*	*1,000 dollars*
California ...	6,561.5	1,141,950	2,497.8	232,830	9,059.3	1,374,780	308.0	304,930	9,367.3	1,679,710
Florida	29.7	15,334	10,123.5	616,280	10,153.2	631,614	3.3	2,169	10,156.5	633,783
Washington ..	1,298.4	234,493	---	---	1,298.4	234,493	.6	349	1,299.0	234,842
New York ...	523.9	108,692	---	---	523.9	108,692	---	---	523.9	108,692
Michigan	392.5	89,590	---	---	392.5	89,590	---	---	392.5	89,590
Oregon	367.6	76,776	---	---	367.6	76,776	12.7	7,453	380.3	84,229
Pennsylvania .	338.3	65,047	---	---	338.3	65,047	---	---	338.3	65,047
Georgia	50.0	15,900	---	---	50.0	15,900	50.0	41,295	100.0	57,195
Texas	7.5	2,100	803.6	37,694	811.1	39,794	10.0	7,625	821.0	47,419
Arizona	11.6	5,278	469.2	41,715	480.8	46,993	---	---	480.8	46,993
Other States .	1,509.9	326,678	---	---	1,509.9	326,678	80.6	53,218	1,590.5	379,896
United States ...	11,090.9	2,081,838	13,894.1	928,519	24,985.0	3,010,357	465.2	417,039	25,450.2	3,427,396

[1] Does not add due to rounding.

Table 4—Fruit and edible tree nuts: Utilized production and value, United States, crop year 1972, 1973, and 1974

Commodity	Utilized production			Value of production		
	Crop year			Crop year		
	1972	1973	1974[1]	1972	1973	1974[1]
	1,000 tons	*1,000 tons*	*1,000 tons*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*
NONCITRUS:						
Apples, commercial	2,935	3,113	3,186	377,670	545,723	520,232
Apricots, 3 States	127	158	94	17,701	25,834	25,267
Avocados, 2 States[2]	89	74	n.a.	44,371	51,612	n.a.
Bananas, Hawaii	3	4	3	720	773	852
Bushberries, 2 States	31	22	31	17,925	19,997	18,425
Cherries, sweet	95	154	148	36,582	56,395	66,492
Cherries, tart	134	87	128	21,934	32,776	47,169
Cranberries	99	101	112	26,035	28,379	31,725
Dates, California	16	24	22	2,652	4,602	4,687
Figs, California	37	42	41	5,145	9,626	9,522
Grapes	2,570	4,193	4,194	423,087	680,079	609,748
Nectarines	86	86	115	15,222	21,803	25,992
Olives, California	24	72	60	10,043	28,888	25,800
Papayas, Hawaii	13	16	19	3,423	4,180	4,944
Peaches[3]	1,144	1,221	1,364	159,847	202,912	258,864
Pears	608	724	710	84,337	99,639	124,079
Persimmons	3	2	2	573	727	631
Plums, California	96	97	143	23,808	31,137	39,182
Pomegranates	4	4	5	460	638	536
Prunes, California	215	594	440	41,195	94,710	63,480
Prunes and plums, other States	42	67	71	7,228	9,816	10,980
Strawberries	229	239	267	109,765	131,592	152,759
Total noncitrus	8,600	[4]11,094	11,155	1,429,383	2,081,838	2,041,366
CITRUS:[5]						
Oranges	8,237	9,737	9,396	549,369	603,305	611,583
Tangerines	221	223	208	22,767	20,729	22,742
Grapefruit	2,623	2,676	2,677	185,586	177,055	153,258
Lemons	634	844	665	80,266	97,302	109,025
Limes, Florida	44	44	42	6,039	6,710	7,560
Tangelos, Florida[6]	162	140	166	9,900	7,312	8,399
Temples, Florida	239	230	238	15,317	15,606	12,402
Total citrus	12,160	13,894	13,392	869,244	928,519	924,969
TREE NUTS:						
Almonds, California	125	134	182	98,125	199,660	167,440
Filberts, 2 States	10	12	7	5,157	7,252	3,620
Macadamia nuts, Hawaii	7	6	7	3,055	3,092	3,986
Pecans	92	138	72	77,636	101,215	67,596
Walnuts, 2 States	117	175	156	65,854	105,820	62,400
Total tree nuts	351	465	424	249,827	417,039	305,042
Total all fruit and nuts	21,111	[4]25,453	24,971	2,548,454	3,427,396	3,271,377

[1] Preliminary. [2] 1972 indicates 1972/73. [3] Production excludes culls and cannery diversions for California clingstone peaches. [4] Due to rounding, totals are not identical in tables 1 and 3. [5] 1972 indicates 1971/72 crop. [6] Excludes K-early citrus fruit.

n.a.—Data not available temporarily.

Table 5--Production and utilization of specified noncitrus fruit, United States, crops of 1970-74

Commodity and crop year	Production		Utilization[1]									
				Processed (fresh equivalent)								
	Total	Utilized[2]	Fresh	Canned	Frozen	Brined	Crushed for			Dried	Other[3]	Total processed[2]
							Wine	Juice	Oil			
	Thousand tons	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*
Apricots:												
1970	176.7	176.4	16.2	116.1	7.7	---	---	---	---	36.4	---	160.2
1971	187.2	149.5	17.6	99.5	6.4	---	---	---	---	26.0	---	131.9
1972	127.6	127.5	10.1	93.0	6.4	---	---	---	---	18.0	---	117.4
1973	157.9	157.7	11.9	116.7	9.6	---	---	---	---	19.5	---	145.8
1974	93.6	93.6	8.4	62.5	5.6	---	---	---	---	17.0	---	85.1
Bananas:												
1970	2.8	2.8	2.8	---	---	---	---	---	---	---	---	---
1971	2.9	2.9	2.9	---	---	---	---	---	---	---	---	---
1972	3.0	3.0	3.0	---	---	---	---	---	---	---	---	---
1973	3.6	3.6	3.6	---	---	---	---	---	---	---	---	---
1974	3.2	3.2	3.2	---	---	---	---	---	---	---	---	---
Bushberries:												
1970	39.7	39.5	1.9	---	---	---	---	---	---	---	---	37.7
1971	34.5	33.8	2.1	---	---	---	---	---	---	---	---	31.7
1972	31.3	31.3	2.2	---	---	---	---	---	---	---	---	29.0
1973	21.8	21.6	1.9	---	---	---	---	---	---	---	---	19.7
1974	32.0	31.5	1.7	---	---	---	---	---	---	---	---	29.7
Cherries, sweet:												
1970	122.3	121.5	48.3	11.8	---	61.4	---	---	---	---	---	73.2
1971	141.3	140.0	68.6	11.4	---	59.0	---	---	---	---	1.0	71.4
1972	95.2	95.0	41.7	7.2	---	43.3	---	---	---	---	2.9	53.4
1973	157.6	153.6	82.8	13.0	---	53.9	---	---	---	---	3.9	70.8
1974	147.6	147.6	66.4	18.8	---	51.7	---	---	---	---	10.6	81.2
Cherries, tart:												
1970	125.5	119.0	6.0	43.4	69.6	---	---	---	---	---	---	113.0
1971	139.9	139.3	5.6	37.3	92.4	---	---	---	---	---	4.0	133.6
1972	155.8	134.2	3.1	41.9	83.1	---	---	---	---	---	6.1	131.1
1973	87.6	87.0	2.6	23.5	57.5	---	---	---	---	---	3.4	84.4
1974	127.8	127.7	2.2	44.7	76.8	---	---	---	---	---	3.9	125.5
Dates:												
1970	18.1	18.1	18.1	---	---	---	---	---	---	---	---	---
1971	19.2	19.2	19.2	---	---	---	---	---	---	---	---	---
1972	15.6	15.6	15.6	---	---	---	---	---	---	---	---	---
1973	23.6	23.6	23.6	---	---	---	---	---	---	---	---	---
1974	21.5	21.5	21.5	---	---	---	---	---	---	---	---	---

See footnotes at end of table.

--Continued.

Table 5—Production and utilization of specified noncitrus fruit, United States, crops of 1970-74—Continued

Commodity and crop year	Production		Utilization[1]									
				Processed (fresh equivalent)								
	Total	Utilized[2]	Fresh	Canned	Frozen	Brined	Crushed for			Dried	Other[3]	Total processed[2]
							Wine	Juice	Oil			
	Thousand tons	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*
Figs:												
1970	49.4	49.4	1.4	6.0	---	---	---	---	---	42.0	---	48.0
1971	45.2	45.2	1.4	3.9	---	---	---	---	---	39.9	---	43.8
1972	36.5	36.5	[4] 3.2	---	---	---	---	---	---	33.3	---	33.3
1973	41.9	41.9	[4] 4.4	---	---	---	---	---	---	37.5	---	37.5
1974	40.6	40.6	[4] 4.9	---	---	---	---	---	---	35.7	---	35.7
Grapes:												
1970	3,119.3	3,119.3	406.0	53.7	---	---	[5] 1,837.8	---	---	821.8	---	2,713.3
1971	3,996.7	3,996.7	410.0	58.4	---	---	2,309.7	337.7	---	880.9	---	3,586.8
1972	2,569.6	2,569.6	349.6	50.5	---	---	1,520.2	212.0	---	437.4	---	2,220.1
1973	4,193.2	4,193.2	400.6	59.0	---	---	2,567.3	196.9	---	969.3	---	3,792.5
1974	4,194.1	4,194.1	454.9	61.2	---	---	2,397.0	263.6	---	1,017.4	---	3,739.2
Nectarines:												
1970	66.0	66.0	64.8	---	---	---	---	---	---	---	---	1.2
1971	69.0	69.0	68.1	---	---	---	---	---	---	---	---	.9
1972	86.0	86.0	85.4	---	---	---	---	---	---	---	---	.6
1973	85.5	85.5	84.6	---	---	---	---	---	---	---	---	.9
1974	114.5	114.5	113.2	---	---	---	---	---	---	---	---	1.3
Olives:												
1970	52.0	52.0	.6	39.2	---	---	---	---	4.1	---	8.1	51.4
1971	55.0	55.0	.7	39.6	---	---	---	---	4.9	---	9.8	54.3
1972	24.2	24.2	.2	20.0	---	---	---	---	.7	---	3.3	24.0
1973	72.4	72.4	.7	57.5	---	---	---	---	3.0	---	11.2	71.7
1974	60.0	60.0	.6	50.2	---	---	---	---	2.5	---	6.7	59.4
Papayas:												
1970	12.5	12.5	12.0	---	---	---	---	---	---	---	---	.5
1971	10.4	10.4	9.6	---	---	---	---	---	---	---	---	.8
1972	12.9	12.9	11.0	---	---	---	---	---	---	---	---	1.9
1973	16.4	16.4	14.4	---	---	---	---	---	---	---	---	2.0
1974	18.7	18.7	17.4	---	---	---	---	---	---	---	---	1.3
Peaches:												
1970	1,500.6	1,395.9	597.1	735.6	36.8	---	---	---	---	18.2	8.2	798.8
1971	1,440.6	1,370.5	600.0	698.6	43.0	---	---	---	---	14.9	14.0	770.5
1972	1,205.2	1,144.2	442.0	634.4	32.6	---	---	---	---	12.0	23.2	702.3
1973	1,310.6	1,221.4	482.7	662.7	52.4	---	---	---	---	12.0	11.6	738.8
1974	1,445.2	1,364.2	467.7	825.4	39.0	---	---	---	---	14.5	17.6	896.5
Pears:												
1970	548.8	538.8	205.7	329.6	---	---	---	---	---	3.5	---	333.1
1971	749.2	706.9	284.5	388.5	---	---	---	---	---	4.5	29.4	422.4
1972	611.7	608.3	250.7	341.8	---	---	---	---	---	5.3	10.5	357.6
1973	728.2	723.6	305.1	387.5	---	---	---	---	---	4.9	26.1	418.5
1974	711.4	710.3	288.4	400.8	---	---	---	---	---	5.1	16.0	421.9

See footnotes at end of table.

--Continued.

Table 5—Production and utilization of specified noncitrus fruit, United States, crops of 1970-74—Continued

Commodity and crop year	Production		Utilization[1]									
				Processed (fresh equivalent)								
	Total	Utilized[2]	Fresh	Canned	Frozen	Brined	Crushed for			Dried	Other[3]	Total processed[2]
							Wine	Juice	Oil			
	Thousand tons	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*	*Thousand tons*
Persimmons:												
1970	2.0	2.0	2.0	---	---	---	---	---	---	---	---	---
1971	1.2	1.2	1.2	---	---	---	---	---	---	---	---	---
1972	2.5	2.5	2.5	---	---	---	---	---	---	---	---	---
1973	2.0	2.0	2.0	---	---	---	---	---	---	---	---	---
1974	1.9	1.9	1.9	---	---	---	---	---	---	---	---	---
California, plums:												
1970	123.0	123.0	118.3	---	---	---	---	---	---	---	---	3.7
1971	101.0	101.0	98.2	---	---	---	---	---	---	---	---	2.8
1972	96.0	96.0	93.3	---	---	---	---	---	---	---	---	2.7
1973	97.0	97.0	93.8	---	---	---	---	---	---	---	---	3.2
1974	143.0	143.0	140.0	---	---	---	---	---	---	---	---	3.0
California, prunes:												
1970	606.0	606.0	---	---	---	---	---	---	---	606.6	---	606.6
1971	393.0	393.0	---	---	---	---	---	---	---	393.0	---	393.0
1972	214.8	214.8	---	---	---	---	---	---	---	214.8	---	214.8
1973	594.5	594.5	---	---	---	---	---	---	---	594.5	---	594.5
1974	440.2	440.2	---	---	---	---	---	---	---	440.2	---	440.2
Other prunes and plums:[6]												
1970	51.5	48.4	28.0	15.2	1.2	---	---	---	---	4.0	---	20.4
1971	88.4	65.0	34.3	22.7	2.5	---	---	---	---	5.5	---	30.7
1972	42.5	41.9	29.0	7.5	3.4	---	---	---	---	2.0	---	12.8
1973	73.3	66.6	29.4	21.7	4.4	---	---	---	---	11.0	---	37.2
1974	70.7	70.7	34.4	18.7	(7)	---	---	---	---	(7)	---	36.4
Strawberries:												
1970	248.2	248.2	158.6	---	---	---	---	---	---	---	---	89.6
1971	260.4	260.4	170.2	---	---	---	---	---	---	---	---	90.2
1972	229.2	229.2	159.9	---	---	---	---	---	---	---	---	69.3
1973	238.6	238.6	157.2	---	---	---	---	---	---	---	---	81.4
1974	266.6	266.6	182.6	---	---	---	---	---	---	---	---	84.0

[1] For all items except bananas and California—apricots, dates, persimmons, plums, and prunes, some quantities canned, frozen, or otherwise processed are included in other utilization categories to avoid disclosure of individual operations. [2] Some totals do not add due to rounding. [3] *Tart cherries*, juice, wine, and brined; *sweet cherries*, frozen, juice, etc.,; *and olives*, chopped, minced, brined and other cures. [4] Includes canned figs. [5] Includes grapes crushed for juice. [6] Michigan, Idaho, Oregon, and Washington. [7] Data breakdown not published.

Table 6—Fruit and edible tree nuts: Season average prices per unit received by growers 1973 and 1974

Commodity	Unit	1973			1974[1]		
		Fresh	Processed	All	Fresh	Processed	All
		Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*	*Dollars*
NONCITRUS:[2]							
Apples, commercial	Lb.	0.107	[3]125.00	0.088	([4])	([4])	0.082
Apricots, 3 States	Ton	268.00	140.00	164.00	446.00	221.00	270.00
Avocados, 2 States[5]	Ton	700.00	---	700.00	([4])	---	([4])
Bananas, Hawaii	Lb.	.106	---	.106	.131	---	.131
Bushberries, 2 States:	Lb.	---	---	.463	---	---	.293
Blackberries	Lb.	.445	.513	.510	.269	.221	.221
Blueberries	Lb.	.368	.341	.347	.413	.256	.316
Boysenberries[6]	Lb.	.449	.495	.491	.340	.323	.324
Currants	Lb.	.250	.209	.210	.250	.200	.201
Loganberries	Lb.	.440	.460	.459	.415	.402	.402
Black raspberries	Lb.	.693	.852	.842	.495	.509	.508
Red raspberries	Lb.	.431	.444	.442	.400	.348	.352
Cherries, sweet	Ton	440.00	281.00	367.00	573.00	350.00	451.00
Cherries, tart	Ton	341.00	378.00	377.00	409.00	369.00	369.00
Cranberries	Bbl.	---	---	14.10	---	---	([4])
Dates, California	Ton	195.00	---	195.00	218.00	---	218.00
Figs, California	Ton	388.00	225.00	230.00	265.00	234.00	235.00
Grapes:	Ton	---	---	162.00	---	---	145.00
California	Ton	300.00	143.00	158.00	250.00	122.00	137.00
Nectarines	Ton	257.00	98.10	255.00	229.00	95.50	227.00
Olives, California	Ton	510.00	398.00	399.00	525.00	429.00	430.00
Papayas, Hawaii	Lb.	.140	.035	.127	.140	.031	.132
Peaches	Lb.	.123	[3]113.00	.083	.131	[3]151.00	.095
Pears	Ton	160.00	[7]121.00	138.00	187.00	[7]166.00	175.00
Persimmons	Ton	373.00	---	373.00	332.00	---	332.00
Plums, California	Ton	331.00	22.60	321.00	279.00	32.80	274.00
Pomergranates	Ton	---	---	168.00	---	---	114.00
Prunes, California	Ton	---	462.00	462.00	---	460.00	460.00
Prunes and plums, other States	Ton	210.00	97.80	147.00	177.00	134.00	155.00
Strawberries	Lb.	.310	.210	.276	.323	.207	.286
CITRUS:[8]							
Oranges	Box	4.01	2.37	2.69	4.38	2.41	2.82
Tangerines	Box	5.77	1.09	4.04	6.31	.76	4.75
Grapefruit	Box	3.62	2.04	2.70	3.35	1.63	2.35
Lemons	Box	6.69	2.11	4.38	8.70	2.10	6.23
Limes	Box	10.60	2.10	6.10	13.45	1.95	7.20
Tangelos	Box	3.30	1.85	2.52	3.55	1.30	2.27
Temples	Box	4.15	2.05	3.06	3.80	1.50	2.34
TREE NUTS:							
Almond, California	Ton	---	---	1,490.00	---	---	920.00
Filberts, 2 States	Ton	---	---	592.00	---	---	540.00
Macadamia nuts, Hawaii	Lb.	---	---	.255	---	---	.290
Pecans, all	Lb.	---	---	.361	---	---	.471
Improved	Lb.	---	---	.426	---	---	.524
Native and seedling	Lb.	---	---	.303	---	---	.386
Walnuts, 2 States	Ton	---	---	605.00	---	---	400.00

[1] Preliminary. [2] Fresh fruit prices are equivalent returns at packinghouse door for Washington and Oregon, first delivery point for California, and at point of first sale in all other States. Processing fruit prices for all States are equivalent returns at processing plant door. [3] Dollars per ton. [4] Data available July 1975. [5] 1973 indicates 1973/74. [6] Includes youngberries. [7] Excludes dried pears. [8] Equivalent packinghouse door—1973 indicates 1972/73.

Data from Statistical Reporting Service.

Table 7—Fruit for processing: Season average price per ton received by growers for selected noncitrus fruit, by type of use, principal States, 1970-74[1]

Fruit, use and State	1970	1971	1972	1973	1974
	Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*
Apricots:					
Canning:					
Washington	---	---	---	90.00	([3])
California	70.00	60.60	103.00	129.00	216.00
Freezing:					
California	69.60	63.60	114.00	136.00	220.00
Drying:					
California (fresh basis)	167.00	154.00	217.00	260.00	375.00
Cherries, tart:					
Processing, all:					
New York	155.00	197.00	163.00	353.00	390.00
Pennsylvania	152.00	222.00	165.00	397.00	393.00
Michigan	143.00	197.00	161.00	390.00	367.00
Wisconsin	158.00	210.00	176.00	418.00	363.00
Washington	315.00	([2])	([2])	([2])	([2])
Cherries, sweet:					
Processing, all:					
New York	192.00	182.00	184.00	290.00	373.00
Michigan	189.00	182.00	188.00	271.00	350.00
Canning:					
Washington	327.00	226.00	296.00	310.00	382.00
Oregon	370.00	275.00	320.00	300.00	430.00
California	400.00	264.00	339.00	([3])	([3])
Michigan	---	205.00	205.00	322.00	396.00
Brining:					
Washington	320.00	250.00	163.00	165.00	290.00
Oregon	300.00	250.00	281.00	300.00	335.00
California	280.00	252.00	315.00	274.00	([3])
Michigan	---	177.00	187.00	262.00	339.00
Figs—California:					
All processing	---	80.80	133.00	225.00	234.00
Grapes—California:[4]					
All processing	71.30	78.30	135.00	143.00	122.00
Grapes—					
California (Cont'd.):					
Dried (fresh basis)	66.60	71.50	135.00	175.00	149.00
Wine	73.30	80.40	135.00	130.00	109.00
Peaches, clingstone:					
Canning:					
California	81.00	79.00	75.00	97.20	([3])
Peaches, freestone:					
Canning:					
Pennsylvania	82.00	89.80	113.00	([3])	138.00
Michigan	([3])	---	97.00	([3])	137.00
Virginia	66.00	78.00	---	104.00	104.00
Georgia	66.00	74.00	78.00	90.00	([3])
Washington	76.40	71.00	80.00	104.00	152.00
California	48.50	52.90	69.00	101.00	([3])
Freezing:					
Pennsylvania	70.60	87.80	97.40	([3])	144.00
California	50.60	63.90	79.70	122.00	135.00
Drying:					
California (fresh basis)	87.50	87.50	110.00	141.00	115.00
Pears, Bartlett:					
Canning:					
Washington	119.00	84.00	105.00	123.00	169.00
Oregon	105.00	80.00	105.00	115.00	([3])
California	123.00	77.00	109.00	114.00	([3])
Drying:					
California (fresh basis)	143.00	125.00	172.00	173.00	150.00
Prunes and plums:					
Canning:					
Washington	108.00	48.00	100.00	([3])	([3])
Oregon	82.00	48.00	---	85.00	129.00
Prunes:					
Drying (fresh basis):					
California	66.70	95.70	191.00	154.00	144.00

[1] Prices are basis bulk fruit at first delivery point for all California fruits except prunes and pears for drying and processed grapes. Prices for California prunes and pears for drying and grapes and for fruits in other States are equivalent processing plant door returns. [2] Discoutinued. [3] Not published to avoid disclosing individual operations. [4] All grape varieties used for processing, wine, and raisin varieties for dried (fresh basis).

Data from Statistical Reporting Service.

Table 8—Fresh fruit: Average retail prices, United States, by months, 1971-75

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Cents	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*
Apples (pound):												
1971	21.0	21.7	22.5	23.5	24.1	25.4	27.9	28.5	25.7	20.9	20.2	21.0
1972	21.6	22.3	22.7	23.1	24.7	26.6	28.4	29.3	27.4	22.9	22.9	23.8
1973	24.6	25.5	26.2	27.9	30.3	34.4	37.0	35.0	32.2	28.6	29.6	30.8
1974	31.8	32.1	32.7	33.5	34.5	37.1	39.9	39.2	36.6	31.3	31.4	31.0
1975	31.7											
Bananas (pound):												
1971	13.9	14.9	15.0	15.0	14.7	14.4	15.1	15.5	15.3	15.8	14.6	14.3
1972	14.4	15.6	15.3	17.0	16.2	16.9	16.3	15.6	15.9	15.7	15.5	15.1
1973	15.1	15.7	15.1	16.6	15.6	17.1	17.6	18.3	17.2	17.3	16.7	15.6
1974	16.6	16.5	14.2	14.4	18.6	23.1	19.3	18.9	20.4	24.1	18.2	17.0
1975	19.3											
Oranges (dozen):												
1971	83.9	86.8	87.7	87.5	91.2	93.8	96.5	101.5	103.7	102.9	99.8	96.3
1972	92.9	91.7	91.2	88.2	88.7	92.7	95.4	101.3	100.6	100.9	97.0	90.0
1973	97.1	97.0	99.8	101.7	103.2	101.5	101.5	110.6	110.6	118.2	116.4	106.2
1974	105.0	104.8	104.3	102.5	110.1	112.2	111.4	117.6	117.5	120.1	119.6	112.0
1975	107.5											
Grapefruit (each):												
1971	13.8	14.3	14.6	15.9	16.6	20.2	22.7	23.8	23.2	20.8	17.1	16.3
1972	16.3	16.3	16.7	16.4	17.7	19.5	20.5	24.2	24.6	25.2	18.4	17.5
1973	17.2	17.5	17.5	17.3	17.8	19.5	21.8	25.0	24.3	25.3	18.9	18.1
1974	18.4	18.3	17.9	17.8	18.6	19.8	20.8	23.0	25.7	20.2	18.8	18.8
1975	19.1											
Lemons (pound):												
1971	31.9	32.4	32.5	32.8	32.9	32.9	33.2	32.8	32.7	33.1	33.4	33.8
1972	34.1	34.5	34.6	34.6	34.6	34.4	33.7	34.6	35.1	35.6	35.1	35.1
1973	34.8	35.8	36.4	36.6	36.5	35.8	36.2	37.7	42.9	43.3	42.2	42.1
1974	42.5	41.4	40.6	41.1	40.9	42.0	40.3	41.7	43.7	43.6	44.3	45.2
1975												
Grapes (pound):												
1971	---	---	---	---	---	---	---	59.1	41.9	41.6	48.1	---
1972	---	---	---	---	---	---	---	52.1	51.1	58.8	57.6	---
1973	---	---	---	---	---	---	---	54.6	48.6	55.1	59.0	---
1974	---	---	---	---	---	---	---	71.1	58.1	60.6	63.1	---
1975	---											
Strawberries (pint):												
1971	---	---	---	---	44.3	41.9	---	---	---	---	---	---
1972	---	---	---	---	41.8	46.5	---	---	---	---	---	---
1973	---	---	---	---	48.2	51.1	---	---	---	---	---	---
1974	---	---	---	---	49.1	53.2	---	---	---	---	---	---
1975	---											

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 9—Processed fruit: Average retail prices, United States, by months, 1971-75

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Cents	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*	*Cents*
CANNED FRUIT												
Peaches (No. 2½ can):												
1971	36.2	36.4	36.4	36.8	36.9	36.4	36.9	37.0	37.1	37.0	36.9	36.9
1972	36.8	37.2	37.5	37.6	37.3	37.2	37.7	37.6	37.7	37.7	37.9	38.0
1973	38.1	38.9	39.1	39.4	39.7	40.5	40.6	41.3	42.5	43.4	44.2	44.8
1974	45.5	46.7	47.3	47.6	49.3	48.8	49.9	54.5	57.6	58.9	59.6	60.2
1975												
Fruit cocktail (No. 303 can):												
1971	29.9	29.9	30.1	30.5	30.6	30.6	31.0	31.0	31.3	31.2	31.2	31.3
1972	31.5	31.4	31.5	31.7	31.6	31.5	31.5	31.4	31.5	31.6	32.0	32.0
1973	32.4	32.8	33.1	33.5	33.4	33.6	33.6	33.6	33.8	34.4	35.3	35.7
1974	36.0	36.7	37.4	37.8	38.2	38.7	39.9	42.6	44.7	45.2	45.9	46.2
1975	46.2											
Pears (No. 2½ can):												
1971	52.2	52.6	52.6	52.9	52.9	53.0	53.0	53.2	53.3	53.2	52.9	52.8
1972	52.8	53.0	52.9	53.0	53.0	53.2	53.2	53.4	53.9	54.2	54.5	54.5
1973	54.8	55.0	55.5	55.8	56.1	56.6	56.6	56.9	56.7	57.5	58.5	58.9
1974	59.1	59.8	60.8	61.0	61.2	61.7	63.1	67.0	69.7	71.6	73.4	74.1
1975	74.1											
CANNED JUICE:												
Pineapple-grapefruit drink (46-oz. can):												
1971	36.1	35.6	35.9	36.3	36.2	36.1	36.2	36.4	36.4	36.5	36.7	36.5
1972	36.6	36.5	36.8	36.9	36.6	36.5	36.9	36.7	36.8	36.9	37.2	37.1
1973	37.3	37.4	37.5	37.8	37.7	38.0	38.0	38.0	38.2	38.5	38.5	38.5
1974	38.8	39.2	39.4	39.6	40.4	41.1	42.1	45.1	46.7	48.9	51.0	51.5
1975	52.2											
CHILLED JUICE												
Orange (quart):												
1971	43.6	42.8	42.8	43.7	44.6	45.2	46.2	46.7	47.1	47.0	47.3	47.5
1972	47.4	47.4	47.4	47.6	47.4	47.4	47.4	47.8	47.2	47.3	47.4	47.6
1973	47.9	48.0	47.8	47.8	47.9	48.2	48.1	48.1	48.4	48.0	48.4	48.6
1974	48.5	48.2	49.4	49.5	49.9	50.3	50.1	51.0	51.3	51.9	52.1	52.2
1975	52.6											
FROZEN												
Concentrated orange juice (6-oz. can):												
1971	21.5	21.6	21.6	22.1	22.3	23.2	23.9	24.5	25.0	25.0	24.9	24.9
1972	24.9	25.0	25.1	25.1	25.0	24.9	25.0	24.9	25.0	24.8	25.0	25.0
1973	25.0	25.1	25.1	25.4	25.1	24.8	24.9	24.9	25.0	25.0	25.3	25.5
1974	25.3	25.3	25.4	25.4	25.5	25.6	25.6	25.7	25.8	26.5	26.7	26.5
1975	27.1											
Concentrated lemonade (6-oz. can):												
1971	13.6	13.7	13.7	13.8	13.8	13.9	13.9	14.0	14.1	14.2	14.1	14.3
1972	14.3	14.4	14.4	14.4	14.3	14.3	14.1	14.1	14.3	14.4	14.6	14.6
1973	14.6	14.6	14.7	14.8	14.8	14.6	14.6	14.6	14.7	14.8	15.0	15.1
1974	15.1	15.2	15.5	15.9	16.1	16.2	16.5	18.0	18.6	19.4	19.7	20.6
1975	21.3											

Data from Bureau of Labor Statistics, U.S. Department of Labor.

Table 10—Selected wholesale canned fruit and fruit juice prices, United States, by months, 1971-75

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per dozen	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*	*Dollars per dozen*
CANNED FRUIT:												
Applesauce												
(No. 303 can):												
1971	1.668	1.688	1.660	1.680	1.688	1.712	1.712	1.757	1.729	1.729	1.729	1.847
1972	1.843	1.827	1.835	1.835	1.855	1.855	1.855	1.855	1.855	1.868	1.932	1.939
1973	1.974	2.006	2.006	2.006	2.047	2.047	2.018	2.047	2.059	2.607	2.607	2.681
1974	2.687	2.723	2.862	2.862	2.914	2.930	2.930	3.011	3.076	3.285	3.285	3.285
1975	3.285											
Fruit cocktail												
(No. 2½ can):												
1971	4.086	4.086	4.086	4.086	4.056	4.164	4.110	4.110	4.126	4.126	4.126	4.165
1972	4.136	4.200	4.274	4.253	4.253	4.253	4.253	4.268	4.292	4.323	4.397	4.433
1973	4.477	4.477	4.477	4.477	4.501	4.501	4.501	4.571	4.685	4.720	4.720	4.727
1974	4.806	4.735	4.860	4.884	4.888	5.065	5.659	5.659	5.910	5.851	5.851	5.753
1975	5.753											
Peaches												
(No. 2½ can):												
1971	3.199	3.199	3.170	3.170	3.165	3.243	3.272	3.243	3.243	3.243	3.243	3.272
1972	3.243	3.258	3.361	3.355	3.355	3.384	3.374	3.428	3.389	3.405	3.457	3.486
1973	3.511	3.511	3.513	3.513	3.585	3.585	3.585	3.720	3.767	3.872	3.872	3.921
1974	4.069	4.069	4.069	4.069	4.069	4.358	4.951	5.168	5.188	5.131	5.131	5.131
1975	5.048											
Pears												
(No. 2½ can):												
1971	4.501	4.501	4.501	4.501	4.476	4.555	4.555	4.542	4.308	4.308	4.308	4.308
1972	4.308	4.240	4.280	4.382	4.423	4.545	4.545	4.582	4.582	4.698	4.698	4.698
1973	4.726	4.728	4.769	4.891	4.891	4.862	4.891	4.905	4.904	4.904	4.904	5.017
1974	5.078	5.078	5.078	5.164	5.164	5.417	5.952	6.091	6.412	6.413	6.316	6.316
1975	6.316											
CANNED JUICE:												
Apple												
(32-oz. bottle):												
1971	2.845	2.845	2.845	2.894	2.894	2.956	2.956	2.956	2.956	2.952	2.952	3.014
1972	3.014	3.014	3.038	3.038	3.085	3.085	3.085	3.085	3.085	3.195	3.232	3.317
1973	3.413	3.511	3.511	3.560	3.560	3.633	3.560	3.633	3.799	4.479	4.479	5.070
1974	5.070	5.152	4.841	4.841	4.841	4.841	4.841	4.841	4.841	4.841	4.841	4.841
1975	4.841											
Orange												
(No. 3 can):												
1971	3.124	3.515	3.613	3.868	3.868	4.083	4.093	4.093	4.093	4.093	4.093	4.250
1972	4.250	4.250	4.289	4.171	4.162	4.162	4.162	4.162	4.162	4.113	4.113	4.142
1973	4.020	3.873	3.946	4.137	4.162	4.101	4.101	4.101	4.101	4.162	4.162	4.162
1974	4.162	4.346	4.346	4.407	4.370	4.370	4.370	4.505	4.664	4.664	4.664	4.689
1975	4.971											
Grapefruit												
(No. 3 can):												
1971	3.893	3.974	3.999	4.342	4.374	4.611	4.684	4.758	4.758	4.758	4.758	4.782
1972	4.782	4.652	4.391	4.391	4.329	4.329	4.486	4.486	4.525	4.525	4.525	4.588
1973	4.588	4.588	4.588	4.133	3.996	3.947	3.898	3.898	3.898	4.045	4.290	4.290
1974	4.343	4.147	4.147	4.147	4.176	4.284	4.343	4.500	4.598	4.672	4.672	4.663
1975	4.663											

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 11—Citrus fruits: Production, 1972/73, 1973/74, and indicated 1974/75[1]

Crop and State	1972/73	1973/74	1974/75
	1,000 boxes[2]	*1,000 boxes*[2]	*1,000 boxes*[2]
Oranges:			
Early, Midseason and Navel varieties[3]			
California	18,700	21,900	25,000
Florida	90,000	92,100	97,000
Texas	5,300	4,200	3,200
Arizona	1,060	450	900
Total	115,060	118,650	126,100
Valencias:			
California	23,400	18,800	25,000
Florida	79,700	73,700	77,000
Texas	2,500	2,400	1,900
Arizona	4,000	2,960	3,600
Total	109,600	97,860	107,500
All oranges:			
California	42,100	40,700	50,000
Florida	169,700	165,800	174,000
Texas	7,800	6,600	5,100
Arizona	5,060	3,410	4,500
Total oranges	224,660	216,510	233,600
Grapefruit:			
Florida, all	45,400	48,100	43,000
Seedless	35,200	38,100	34,000
Pink	11,700	12,200	11,500
White	23,500	25,900	22,500
Other	10,200	10,000	9,000
Texas	11,800	10,700	7,800
Arizona	2,640	2,050	2,500
California	5,800	4,250	5,500
Desert Valleys	3,000	2,350	2,800
Other areas	2,800	1,900	2,700
Total grapefruit	65,640	65,100	58,800
Lemons:			
California	17,600	14,600	19,500
Arizona	4,600	2,900	6,000
Total lemons	22,200	17,500	25,500
Limes:			
Florida	1,100	1,050	1,150
Tangelos[4]:			
Florida	3,100	3,700	4,400
Tangerines:			
Florida	3,000	2,800	3,100
Arizona	530	680	700
California	1,600	1,310	1,400
Total tangerines	5,130	4,790	5,200
Temples:			
Florida	5,100	5,300	5,300

[1] The crop year begins with bloom of the first year and ends with completion of harvest the following year. [2] Net content of box varies. Approximate averages are as follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas, 85 lbs.; Grapefruit-California, Desert Valleys and Arizona, 64 lbs.; other California areas, 67 lbs.; Florida, 85 lbs. and Texas, 80 lbs.; Lemons, 76 lbs.; Limes-80 lbs.; Tangelos-90 lbs.; Tangerines-California and Arizona, 75 lbs.; Florida, 95 lbs.; and Temples-90 lbs. [3] Navel and Miscellaneous varieties in California and Arizona. Early and Midseason varieties in Florida and Texas, including small quantities of tangerines in Texas. [4] Excludes K-early citrus fruit.

Table 12—Selected fresh citrus fruit prices, f.o.b. packed fresh, by months, 1971-75

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per box	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*	*Dollars per box*
ORANGES:												
Florida:												
1971	3.90	4.85	4.65	4.60	5.05	5.60	---	---	---	8.10	5.40	5.30
1972	4.85	5.10	4.85	4.60	4.80	5.30	6.30	---	---	6.00	4.40	4.40
1973	4.80	4.80	4.90	4.75	4.55	4.80	4.95	---	---	---	---	5.30
1974	5.10	5.50	5.11	4.75	5.00	5.10	5.50	---	---	---	5.10	5.40
1975	5.10											
Texas:												
1971	3.35	3.50	3.70	3.65	3.80	4.20	---	---	---	4.85	3.85	4.10
1972	4.20	4.40	4.60	4.20	---	---	---	---	---	4.80	4.00	4.10
1973	3.80	3.50	3.90	4.20	3.80	---	---	---	---	5.30	4.80	4.40
1974	3.94	4.90	4.90	4.10	---	---	---	---	---	6.80	5.00	5.25
1975	4.94											
Arizona:												
1971	5.70	5.50	6.80	5.90	5.00	5.80	6.20	---	---	---	9.60	7.60
1972	6.20	4.65	4.90	4.90	4.80	5.00	5.20	---	---	---	6.40	6.20
1973	7.50	7.11	6.51	7.00	7.25	5.90	6.25	---	---	---	---	6.70
1974	7.40	8.01	5.80	5.50	6.60	6.50	5.95	---	---	---	10.60	7.20
1975	6.90											
California:												
1971	6.60	6.70	6.60	6.54	6.62	6.10	5.90	6.10	6.20	6.50	7.02	6.76
1972	6.20	6.10	5.94	5.89	5.71	5.62	6.04	6.18	6.34	5.70	6.30	6.90
1973	7.30	7.30	7.78	7.64	6.44	6.15	6.60	6.60	7.70	7.40	6.65	7.45
1974	7.45	7.75	6.80	6.87	7.19	7.35	6.85	---	7.30	8.05	10.81	7.35
1975	7.00											
GRAPEFRUIT:												
Florida:												
1971	4.18	4.73	5.05	5.45	6.45	---	---	---	---	6.07	5.35	5.41
1972	5.23	5.35	5.07	5.38	6.03	6.21	---	---	---	7.08	5.55	5.44
1973	5.23	5.44	5.40	5.46	5.74	5.98	---	---	---	6.05	5.69	5.49
1974	5.53	5.23	4.93	4.96	5.47	5.71	---	---	---	5.83	5.62	5.75
1975	5.83											
Texas:												
1971	3.55	3.80	4.05	4.40	5.20	5.00	---	---	---	7.10	4.70	4.60
1972	4.50	4.40	4.80	4.70	---	---	---	---	---	8.70	6.20	5.60
1973	5.20	4.90	5.00	4.50	4.45	---	---	---	---	---	6.40	5.70
1974	4.80	4.90	4.70	4.70	4.80	---	---	---	---	7.70	6.10	6.00
1975	6.10											
LEMONS:												
Arizona:												
1971	8.40	6.70	---	---	---	---	---	---	---	10.50	9.80	8.60
1972	8.60	8.50	---	---	---	---	---	---	---	9.80	9.40	9.50
1973	9.50	10.10	---	---	---	---	---	---	---	14.70	12.60	11.70
1974	11.25	10.10	10.20	---	---	---	---	---	---	14.90	11.00	8.70
1975	10.40											
California:												
1971	9.80	9.70	9.80	10.30	10.00	9.90	9.40	8.75	9.21	9.01	9.34	9.33
1972	9.65	9.88	9.98	9.97	10.07	9.72	10.24	10.30	10.10	9.70	9.40	9.55
1973	10.20	10.00	10.00	8.55	9.20	9.90	10.60	11.50	17.00	13.90	12.90	11.50
1974	12.20	11.80	11.85	10.60	10.50	10.90	11.00	14.00	11.70	14.40	9.20	8.60
1975	10.60											

Source: Statistical Reporting Service.

Table 13– Frozen concentrated citrus juices: Florida stocks, packs, supplies and movements, current season with comparison

Item and season	Carryin	Pack	Imports	Total supply	Total season movements	Carryout
	Million gallons	*Million gallons*	*Million gallons*	*Million gallons*	*Million gallons*	*Million gallons*
Orange:						
1970/71	26.6	125.2	8.5	160.3	137.7	22.6
1971/72	22.6	134.2	11.7	168.5	140.8	27.7
1972/73	27.7	176.1	4.1	207.9	160.5	47.4
1973/74	47.4	171.8	4.6	223.8	174.9	48.9
1974/75	48.9					
Grapefruit:						
1970/71	0.5	6.9	---	7.4	6.3	1.1
1971/72	1.1	8.8	---	9.9	7.1	2.8
1972/73	2.8	8.7	---	11.5	7.9	3.6
1973/74	3.6	9.0	---	12.6	7.7	4.9
1974/75	4.9					
Tangerine:						
1970/71	0.1	1.1	---	1.2	0.9	0.3
1971/72	.3	1.2	---	1.5	1.3	.2
1972/73	.2	1.1	---	1.3	1.1	.2
1973/74	.2	1.0	---	1.2	.8	.4
1974/75	.4					

Compiled from Florida Canners Association reports.

Table 14—Citrus fruit: United States exports of selected fresh and process items, by areas of destination, 1970/71-1974/75[1]

Item and season	Canada	Europe				Other	Total
		United Kingdom	Original EC[2]	Other	Total		
	1,000 boxes[3]	*1,000 boxes*[3]	*1,000 boxes*[3]	*1,000 boxes*[3]	*1,000 boxes*[3]	*1,000 boxes*[3]	*1,000 boxes*[3]
Fresh fruit:							
Oranges:[4]							
1970/71	4,638	112	992	108	1,212	1,974	7,824
1971/72	5,135	130	1,223	146	1,499	2,993	9,627
1972/73	4,363	117	980	130	1,227	3,297	8,887
1973/74	4,813	308	1,247	308	1,863	3,442	10,118
1973/74 thru Dec.	827	(5)	138	131	269	348	1,444
1974/75 thru Dec.	851	4	17	261	282	502	1,635
Grapefruit:							
1970/71	2,180	10	314	27	351	158	2,689
1971/72	2,087	30	438	27	495	2,438	5,020
1972/73	1,892	69	625	35	729	2,674	5,295
1973/74	1,450	44	611	55	710	4,317	6,477
1973/74 thru Dec.	428	15	195	15	225	530	1,183
1974/75 thru Dec.	473	19	243	15	277	167	917
Lemons and limes:							
1970/71	455	39	1,121	349	1,509	1,889	3,853
1971/72	425	24	1,217	425	1,666	2,453	4,544
1972/73	599	54	1,571	590	2,215	2,946	5,760
1973/74	531	72	1,487	731	2,290	2,847	5,668
1973/74 thru Dec.	91	5	164	31	200	331	622
1974/75 thru Dec.	95	7	281	29	317	413	825
	1,000 gallons	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*
Canned juice, s.s.:							
Orange:							
1970/71	5,017	137	3,015	2,123	5,275	639	10,931
1971/72	5,251	45	2,170	881	3,096	595	8,942
1972/73	5,525	83	2,868	879	3,830	774	10,129
1973/74	5,621	46	2,571	650	3,267	1,195	10,083
1973/74 thru Dec.	821	4	401	70	475	154	1,450
1974/75 thru Dec.	899	---	204	135	339	110	1,348
Grapefruit:							
1970/71	3,182	136	1,291	229	1,656	281	5,119
1971/72	3,575	28	982	124	1,134	241	4,956
1972/73	3,437	14	904	142	1,060	360	4,857
1973/74	3,362	18	898	157	1,073	530	4,965
1973/74 thru Dec.	373	---	152	25	177	56	606
1974/75 thru Dec.	787	---	32	12	44	52	883
Orange juice concentrate:							
Hot pack:							
1970/71	111	47	616	387	1,050	256	1,417
1971/72	128	7	617	209	833	349	1,310
1972/73	54	32	329	291	652	464	1,170
1973/74	56	94	395	332	821	518	1,395
1973/74 thru Dec.	6	---	65	52	117	145	268
1974/75 thru Dec.	8	---	30	28	58	50	116
Frozen:							
1970/71	3,836	526	719	2,424	3,669	203	7,708
1971/72	4,408	327	1,362	1,557	3,246	271	7,925
1972/73	5,122	635	2,140	2,800	5,575	310	11,007
1973/74	6,158	511	1,325	3,067	4,903	912	11,973
1973/74 thru Dec.	849	101	104	434	639	44	1,532
1974/75 thru Dec.	1,015	30	52	230	312	61	1,388

[1] Season beginning September 1 for fresh grapefruit; November 1 for all other items. [2] Belgium-Luxembourg, France, West Germany, Italy and Netherlands. [3] Box weights, pounds; oranges, 70; grapefruit, 80; lemons, 76. [4] Includes tangerines. [5] Negligible.

Table 15—Apples, commercial crop[1]: Utilized production, 1972, 1973, and 1974

State and area	1972	1973	1974	State and area	1972	1973	1974
	Million pounds	*Million pounds*	*Million pounds*		*Million pounds*	*Million pounds*	*Million pounds*
Eastern States:				Central States cont'd.:			
Maine	75.0	55.0	69.0	Wisconsin	65.0	50.0	65.0
New Hampshire	55.0	44.0	61.0	Minnesota	26.0	20.0	24.4
Vermont	40.6	28.0	38.0	Iowa	13.3	10.4	11.3
Massachusetts	91.0	76.0	91.0	Missouri	60.0	51.0	53.0
Rhode Island	3.2	4.0	4.0	Kansas	12.0	15.0	13.0
Connecticut	30.0	30.0	45.0	Kentucky	14.1	9.8	14.7
New York	770.0	720.0	900.0	Tennessee	9.2	3.1	9.0
New Jersey	88.0	100.0	110.0	Arkansas	8.6	6.0	7.5
Pennsylvania	400.0	500.0	470.0	Total	1,248.2	881.3	1,144.9
Delaware	11.0	12.0	13.5				
Maryland	66.0	70.0	65.0	Western States:			
Virginia	420.0	400.0	390.0	Idaho	50.0	130.0	93.0
West Virginia	215.0	225.0	180.0	Colorado	11.0	115.0	45.0
North Carolina	245.0	210.0	250.0	New Mexico	2.0	38.0	6.0
South Carolina	20.0	17.0	20.0	Utah	4.0	52.7	37.0
Total	2,529.8	2,491.0	2,706.5	Washington	1,390.0	1,860.0	1,750.0
				Oregon	105.0	167.0	150.0
Central States:				California	530.0	490.0	440.0
Ohio	135.0	100.0	135.0	Total	2,092.0	2,852.7	2,521.0
Indiana	75.0	63.0	63.0				
Illinois	100.0	83.0	79.0	United States	5,870.0	6,225.0	6,372.4
Michigan	730.0	470.0	670.0				

[1] In orchards of 100 or more bearing trees.

Table 16—Apples, commercial crop[1]: Production by varieties, United States, 1972, 1973, and 1974

Variety	1972	1973	1974
	Million pounds	*Million pounds*	*Million pounds*
Cortland	125.9	125.6	146.3
Delicious	1,729.5	2,174.2	2,050.4
Golden Delicious	922.2	975.5	1,045.4
Gravenstein	107.2	84.1	85.2
Jonathan	362.5	379.3	356.0
McIntosh	656.7	487.4	708.5
Northern Spy	115.0	82.1	92.6
R. I. Greening	121.9	68.5	117.0
Rome Beauty	459.8	511.9	477.7
Stayman	222.2	237.2	240.0
Winesap	162.3	168.0	162.5
Yellow Newtown	153.4	162.5	137.5
York Imperial	273.9	341.7	257.9
Other	468.8	440.5	516.7
Total[1]	5,881.3	6,238.5	6,393.7

[1] Commercial crops refer to the total production of apples in orchards of 100 or more bearing trees. Data include small quantities of mature fruit not harvested and excess cullage of harvested fruit not included in data in table 15.

Table 17—Pears: Utilized production by States and Pacific Coast, variety composition, 1972, 1973, and 1974

State	1972	1973	1974
	Tons	*Tons*	*Tons*
Connecticut	2,000	1,500	1,400
New York	18,500	12,600	14,000
Pennsylvania	2,950	1,800	3,200
Michigan	22,500	9,500	10,500
Idaho	800	1,300	1,050
Colorado	2,780	5,510	4,590
Utah	200	5,830	3,200
Washington	153,000	187,300	199,000
Oregon	110,000	171,000	162,500
California	295,600	327,300	310,900
United States	608,330	723,640	710,340

Pacific Coast	1972	1973	1974
	Tons	*Tons*	*Tons*
Washington:			
Bartlett	99,000	123,500	125,500
Other	54,000	63,800	73,500
Total	153,000	187,300	199,000
Oregon:			
Bartlett	51,000	73,000	64,000
Other	59,000	98,000	98,500
Total	110,000	171,000	162,500
California:			
Bartlett	286,000	317,000	297,000
Other	9,600	10,300	13,900
Total	295,600	327,300	310,900
3 States:			
Bartlett	436,000	513,500	486,500
Other	122,600	172,100	185,900
Total	558,600	685,600	672,400

Table 18—Canned noncitrus fruit: Canners' stocks, packs, supplies, and shipments, current season, with comparisons

Item and season[1]	Carryin	Pack	Total supply	Shipments to January 1	January 1 stocks	Total season shipments	Carryout
	1,000 equivalent cases 24 No. 2½'s						
Total—14 items:							
1970/71	32,155	92,949	125,104	52,282	64,966	95,450	29,654
1971/72	29,654	92,441	122,095	51,436	61,351	94,647	27,448
1972/73	27,448	82,540	109,988	53,745	49,209	93,868	16,120
1973/74	16,120	89,293	105,413	55,677	39,398	91,382	14,031
1974/75	14,031			52,176	50,673		
Apples:							
1970/71	1,417	2,090	3,507	1,032	2,161	2,476	1,031
1971/72	1,031	2,358	3,389	1,110	1,582	2,672	717
1972/73	717	2,162	2,879	1,090	982	2,589	290
1973/74	290	3,246	3,536	1,042	829	2,807	729
1974/75	729			908	1,445		
Applesauce:							
1970/71	4,170	14,131	18,301	5,541	10,705	15,211	3,090
1971/72	3,090	15,148	18,238	5,548	9,402	14,911	3,327
1972/73	3,327	11,942	15,269	4,963	8,166	13,954	1,315
1973/74	1,315	15,166	16,481	5,536	6,613	14,076	2,405
1974/75	2,405			4,554	10,183		
Apricots:[2]							
1970/71	[3]2,067	3,766	5,833	2,569	3,264	4,137	1,696
1971/72	1,696	3,262	4,958	3,071	1,887	4,397	561
1972/73	561	3,041	3,602	2,194	1,408	3,304	298
1973/74	298	4,094	4,392	2,618	1,774	3,925	467
1974/75	467	1,987	2,454	1,697	757		-
Cherries, RSP:							
1970/71	152	978	1,130	558	572	1,028	102
1971/72	102	1,041	1,143	480	663	900	243
1972/73	243	1,299	1,542	1,171	371	1,533	9
1973/74	9	579	588	505	83	583	5
1974/75	5	1,188	1,193	784	409		
Cherries, sweet:							
1970/71	[3]330	663	993	372	621	605	388
1971/72	388	536	924	376	548	609	315
1972/73	315	393	708	335	373	518	190
1973/74	190	503	693	351	342	566	127
1974/75	127	623	750	273	477		
Fruit cocktail:[2]							
1970/71	[3]3,426	13,081	16,507	7,345	9,162	13,054	3,453
1971/72	3,453	13,334	16,787	6,994	9,793	12,451	4,336
1972/73	4,336	11,855	16,191	7,620	8,571	13,856	2,335
1973/74	2,335	13,384	15,719	9,108	6,611	14,479	1,240
1974/75	1,240	14,907	16,147	8,092	8,055		

--Continued.

Table 18—Canned noncitrus fruit: Canners' stocks, packs, supplies, and shipments, current season, with comparisons—Continued

Item and season[1]	Carryin	Pack	Total supply	Shipments to January 1	January 1 stocks	Total season shipments	Carryout
	1,000 equivalent cases 24 No. 2½'s						
Fruits for salad:[2]							
1970/71	[3]299	658	957	439	518	737	220
1971/72	220	784	1,004	392	612	779	225
1972/73	225	724	949	396	553	737	212
1973/74	212	799	1,011	483	528	806	205
1974/75	205	876	1,081	398	683		
Mixed fruits:[2]							
1970/71	262	548	810	532	278	652	158
1971/72	158	695	853	583	270	739	114
1972/73	114	752	866	581	285	767	99
1973/74	99	736	835	599	236	776	59
1974/75	59	959	1,018	648	370		
Peaches, sliced clings:[2]							
1970/71	142	230	372	265	107	338	34
1971/72	34	308	342	233	109	292	50
1972/73	50	359	409	243	166	324	85
1973/74	85	189	274	222	52	252	22
1974/75	22	304	326	205	121		
Peaches, clingstone:[2]							
1970/71	[3]7,375	24,878	32,253	14,855	17,398	25,490	6,763
1971/72	6,763	21,839	28,602	13,623	14,979	24,712	3,890
1972/73	3,890	21,233	25,123	15,505	9,618	23,532	1,591
1973/74	1,591	21,615	23,206	15,314	7,892	21,819	1,387
1974/75	1,387	28,893	30,370	17,292	13,078		
Peaches, U.S. freestone:							
1970/71	[3]1,797	4,663	6,460	3,434	3,026	5,266	1,194
1971/72	1,194	3,923	5,117	2,460	2,657	4,174	943
1972/73	943	2,783	3,726	2,438	1,288	3,530	196
1973/74	196	2,899	3,095	1,555	1,540	2,890	205
1974/75	205	3,448	3,653	1,777	1,876		
Pears:							
1970/71	2,990	8,610	11,600	4,427	7,173	8,312	3,288
1971/72	3,288	10,309	13,597	5,589	8,008	9,909	3,688
1972/73	3,688	9,063	12,751	5,535	7,216	10,320	2,431
1973/74	2,431	9,841	12,272	6,636	5,636	10,499	1,773
1974/75	1,773	10,588	12,361	5,739	6,622		
Pineapple:							
1970/71	[3]6,811	17,813	24,624	10,035	9,102	16,837	7,787
1971/72	7,787	17,705	25,492	10,135	10,034	16,829	8,663
1972/73	8,663	16,540	25,203	11,205	9,911	18,191	7,012
1973/74	7,012	14,981	21,993	11,044	6,608	16,804	5,189
1974/75	5,189			9,108	5,914		
Purple plums, U.S.:							
1970/71	917	840	1,757	878	879	1,307	450
1971/72	450	1,199	1,649	842	807	1,273	376
1972/73	376	394	770	469	301	713	57
1973/74	57	1,261	1,318	664	654	1,100	218
1974/75	218	1,166	1,384	701	683		

[1] Season beginning September 1 for apples and applesauce, July 1 for RSP cherries, and June 1 for all other items. [2] California only. [3] 1970/71 canners' carryin excludes cyclamate packs.

Source: Prepared from reports of National Canners Association, Canners League of California, and Pineapple Growers Association of Hawaii.

Table 19—Canned apple and pineapple juices: Canners' carryin, pack, supplies, shipments, and stocks, current season with comparisons

Item and season[1]	Carryin	Pack		Supply		Shipments		Jan. 1 stocks[2]
		To Jan. 1	Total season	To Jan. 1	Total season	To Jan. 1	Total season	
	1,000 equivalent cases, 24 No. 2's							
Canned Juice:								
Apple juice:								
1973/74	1,866	8,669	14,793	10,535	16,659	5,098	13,385	5,437
1974/75	3,274	8,420		11,694		4,992		6,702
Single strength pineapple juice:								
1970/71	4,617	10,224	13,704	14,841	18,321	8,039	13,021	6,802
1971/72	5,300	10,668	13,641	15,968	18,941	7,472	12,836	8,496
1972/73	6,105	9,678	12,328	15,783	18,433	8,582	14,334	7,201
1973/74	4,099	8,889	11,350	12,988	15,449	7,440	11,601	5,548
1974/75	3,848	6,669		10,517		5,603		4,914
	1,000 equivalent cases, 6 No. 10's							
Concentrated pineapple juice:								
1970/71	473	938	1,661	1,411	2,134	805	1,355	606
1971/72	779	942	1,420	1,721	2,199	741	1,188	980
1972/73	1,011	660	1,080	1,671	2,091	642	1,176	1,029
1973/74	915	1,024	1,540	1,939	2,455	958	1,653	981
1974/75	802	1,010		1,812		561		1,251

[1] Season beginning September 1 for canned apple juice and June 1, pineapple juice.

Prepared from reports of National Canners Association and Pineapple Growers Association of Hawaii.

Table 20—Fresh fruit: Retail price, marketing margin, and grower and packer return per pound, sold in New York City, indicated months, 1973 and 1974

Commodity and season	Retail (cents)	Marketing margin		Grower and packer return[1] (f.o.b. shipping point price)[2]	
		Cents	Percentage of retail price	Cents	Percentage of retail price
Apples, Eastern Delicious					
November 1974	30.7	14.6	48	16.1	52
October 1974	33.1	14.6	44	18.5	56
November 1973	29.2	14.3	49	14.9	51
Apples, Eastern McIntosh					
November 1974	32.5	20.1	62	12.4	38
October 1974	(3)	(3)	(3)	(3)	(3)
November 1973	34.0	15.9	47	18.1	53
Apples, Western Delicious					
November 1974	42.3	24.3	57	18.0	43
October 1974	44.0	24.3	55	19.7	45
November 1973	39.3	24.4	62	14.9	38
Grapefruit					
November 1974	17.9	11.6	65	6.3	35
October 1974	(3)	(3)	(3)	(3)	(3)
November 1973	16.8	10.6	63	6.2	37
Grapes, Emperor					
November 1974	56.4	37.8	67	18.6	33
October 1974	66.1	44.4	67	21.7	33
November 1973	(4)	(4)	(4)	(4)	(4)
Lemons, Western					
November 1974	41.4	26.4	64	15.0	36
October 1974	39.1	20.4	52	18.7	48
November 1973	38.8	21.6	56	17.2	44
Oranges, California Valencia					
November 1974	29.1	16.2	56	12.9	44
October 1974	29.6	19.6	66	10.0	34
November 1973	26.6	17.2	65	9.4	35
Oranges, Florida					
November 1974	19.7	13.6	69	6.1	31
October 1974	(3)	(3)	(3)	(3)	(3)
November 1973	20.0	13.2	66	6.8	34

[1] For quantity of product equivalent to retail unit sold to consumers: Because of waste and spoilage during marketing, equivalent quantiy exceeds retail unit. [2] Production areas: Apples, Eastern Delicious-*New York State*; Apples, Eastern McIntosh-*New York State*; Apples, Western Delicious-*Washington*; Grapefruit-*Florida*; Grapes-*California*; Lemons-*California*. [3] Not priced in October. [4] Not available.

Table 21—Fresh fruits: 1974 representative truck rates for selected fruits[1]

Commodity, area, and city	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per package											
Apples (Tray packed carton)												
Yakima, Washington area to:												
Atlanta	1.50	1.62	1.65	1.65	1.65	1.65	1.65	1.65	1.65	1.70	1.70	1.70
Chicago	1.32	1.35	1.40	1.40	1.40	1.40	1.38	1.38	1.40	1.40	1.40	1.40
Dallas	1.30	1.30	1.38	1.35	1.35	1.35	1.35	1.25	1.35	1.40	1.40	1.40
Los Angeles	.72	.75	.75	.75	.75	.75	.75	.75	.75	.80	.80	.80
New York City	1.88	1.90	1.95	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Western and Central New York area to:												
New York City	.40	.40	.50	.50	.50	---	---	---	---	.50	.50	.50
Pittsburgh	.35	.35	.45	.45	.45	---	---	---	---	.45	.45	.45
Grapefruit (4/5 bu. ctn.)												
Lakeland, Florida area to:												
Atlanta	.32	.32	.32	.32	---	---	---	---	---	---	.32	.32
Boston	1.15	1.15	1.15	1.15	---	---	---	---	---	---	1.00	1.00
Chicago	.95	.95	.95	.95	---	---	---	---	---	---	.82	.82
New York City	1.00	1.00	1.00	1.00	---	---	---	---	---	---	.85	.85
Pittsburgh	1.00	1.00	1.00	1.00	---	---	---	---	---	---	.85	.85
Grapes (23 lb. lug)												
Fresno area to:												
Atlanta	N/A	N/A	N/A	N/A	---	---	---	1.15	1.12	.98	.98	.98
Chicago	N/A	N/A	N/A	N/A	---	---	---	1.00	1.00	.88	.88	.86
Dallas	N/A	N/A	N/A	N/A	---	---	---	.75	.75	.78	.72	.70
New York City	N/A	N/A	N/A	N/A	---	---	---	1.30	1.25	1.18	1.18	1.16
Lemons (7/10 bu. ctn.)												
Southern California area to:												
Atlanta	1.40	1.40	1.50	1.50	1.85	1.85	2.18	2.18	2.18	2.18	2.18	2.18
Chicago	1.10	1.10	1.20	1.30	1.30	1.45	1.45	1.45	1.45	1.45	1.45	1.45
New York City	1.70	1.70	1.80	1.80	2.00	2.25	2.25	2.25	2.25	2.25	2.25	2.25
Oranges (7/10 bu. ctn.)												
Southern California area to:												
Chicago	1.10	1.10	1.20	1.20	1.30	1.30	1.45	1.45	1.45	1.45	1.45	1.45
Dallas	.95	.95	1.00	1.00	1.10	1.10	1.30	1.30	1.30	1.30	1.30	1.30
New York City	1.70	1.70	1.80	1.80	2.00	2.00	2.25	2.25	2.25	2.25	2.25	2.25
Oranges (4/5 bu. ctn.)												
Lakeland, Florida area to:												
Atlanta	.35	.38	.35	.35	.35	---	---	---	---	---	.32	.32
Chicago	1.05	1.05	1.02	1.00	1.02	---	---	---	---	---	.82	.82
Dallas	.90	.90	.90	.92	1.00	---	---	---	---	---	N/A	N/A
New York City	1.00	1.10	1.05	1.08	1.08	---	---	---	---	---	.88	.88
Pittsburgh	1.05	1.08	1.08	1.08	1.08	---	---	---	---	---	.88	.88

[1] Reported from a sample of shippers and/or truck brokers in specified areas for shipments during first week of month.

N/A = Not available.

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CHANGING MARKETING PATTERNS FOR DOMESTIC TREE NUTS

by
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ABSTRACT: During the period 1960-1973 total production of domestic tree nuts nearly doubled and the value of production more than tripled. Pecans, walnuts, and almonds each comprise about 30 percent of the total production; filberts and Macadamia nuts account for the remainder. Marketing agencies have declined in number but increased in size during the past 13 years. Marketing channels and outlets have remained about the same, except that prepared dry cereals are a new outlet for almonds and pecans, and gift packs have become more important for all tree nuts.

Key Words: Almonds, filberts, pecans, walnuts, tree nuts, marketing outlets, distribution.

Tree nuts have been grown and consumed in the United States since colonial times, but the production of almonds, filberts, pecans, and walnuts on a commercial basis dates back probably less than 75 years. During the period 1960-1973, total production of tree nuts nearly double while the value of production more than tripled. Before the 1930's, the U.S. imported more tree nuts than were produced domestically, but in recent years imports of types of nuts produced domestically have been a minor part of our total supplies (with the exception of filberts).

The rapid expansion of the tree nut industries has been marked by wide fluctuations in the quantities of the various kinds of nuts produced, resulting in marketing problems for growers and marketing organizations. This paper documents the growth of the domestic tree nut industries in recent years and gives a brief review of the marketing agencies and marketing channels for each of the four major domestic tree nuts.

Domestic Production Increases

Commercial production of the four major tree nuts in the United States has trended upward during the past three decades (Figure 1). In 1973, a record crop of approximately 449,300 tons of tree nuts (including 5,500 tons of Macadamia nuts) was produced. The 1960-64 average production was 277,563 tons, and this included the previous record crop of 340,000 tons in 1963.

Traditionally pecans and walnuts have been the largest domestic tree nut crops, but during the 1960's there was a rapid increase in bearing acres and production of almonds, which now account for about one-third of the total production. This compares with 15 percent of the total crop in the 1930's and 20 percent in the 1950's.

Commerical acreages of almonds and walnuts are located in California; filberts, and a few walnuts, are located in Oregon; and pecans are produced commerically in 15 Southeastern, Southcentral, and Southwestern States, ranging from North Carolina in the east to Arizona in the west and northward into southern portions of Missouri and Illinois. When Hawaii became a State, Macadamia nuts were added to our domestic tree nuts, and since 1970 extensive plantings of pistachio nuts have been made in California and Arizona. These will be important domestic tree nuts in the years ahead.

All of the commercial acreage of almonds is in California, principally in a central belt about 700 miles long. Between 1960 and 1974, total commerical bearing acreage of almonds increases 157 percent, and output increased 240 percent from 53,000 tons in 1960 to 180,000 in 1973 (Figure 2). Due to fluctuations in yields, comparisons of 2 years may be misleading. However, production during the 1969-73 period was 106 percent greater than during 1959-63.

Nearly all of the acreage used for producing filberts is in Oregon, with most of the plantings in the Willamette Valley. The remaining acreage is located in the southwestern section of Washington. Commercial production of filberts was first reported in 1930 and during the 1930's and 1940's percentage increases in acreage and production were impressive. However, acreage declined from approximately 26,000 acres in the early 1950's to about 21,000 acres in 1972 and during the entire period production has fluctuated around the 9,000-ton level (Figure 3). Much

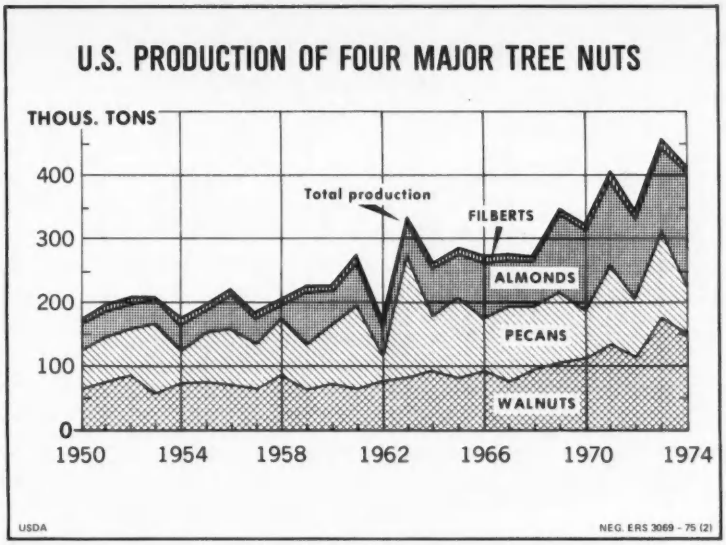

Figure 1

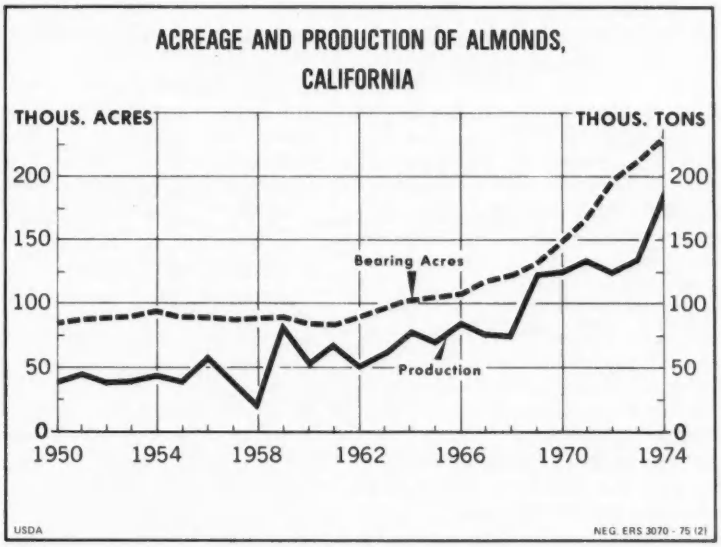

Figure 2

of the loss in acreage was due to severe weather in 1962 and 1967.

More than 90 percent of the domestic walnut acreage is in California. In recent years the center of walnut production has moved from southern California northward to the San Joaquin and Sacramento Valleys and the coastal valleys both north and south of San Francisco. Most of the remaining domestic walnut acreage is found in the Willamette Valley of Oregon and a few walnuts are produced in southwestern Washington. Total acreage of bearing walnut trees rose from approximately 140,000 acres in 1950 to nearly 168,000 acres in 1973 (Figure 4). During the same period production rose from 65,000 to approximately 155,000 tons. Thus, a 20 percent rise in acreage produced a 138 percent increase in production, indicating additional acres coming of bearing age during the period and the rapid increases in production efficiency by the California walnut industry. The Oregon walnut industry has been severely damaged by periodic weather catastrophies and is expected to be of decreasing importance in the commercial production of walnuts.

Pecans are grown in widely scattered areas of the United States, but those entering commerical channels are usually harvested in the southern tier of

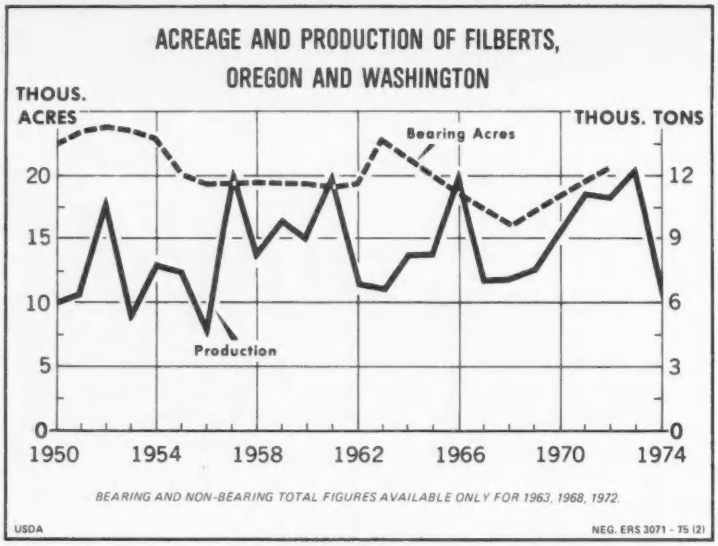

Figure 3

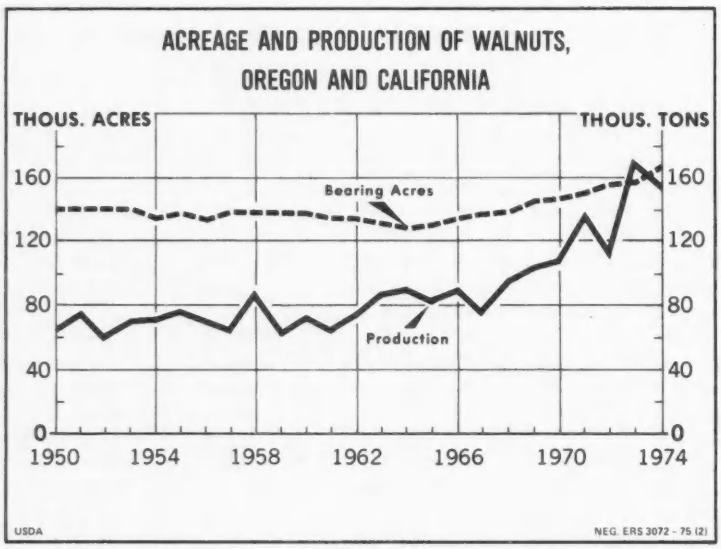

Figure 4

the United States. There are no accurate national data on total acres of pecan trees, because many pecan trees are wild or seedlings, ones that have volunteered along streams and on broad alluvial plains throughout the South. Total production of pecans has shown a steady upward trend, with sharp variations in year-to-year production because of the biennial production habit of pecan trees (Figure 5). During the 1969-1973 period, cultivated varieties comprised 55 percent of the total pecan crop, a slight increase from 1959-63 when improved varieties accounted for 53 percent. Georgia, Alabama, Mississippi, and New Mexico usually lead in the production of improved varieties. Texas, Oklahoma, and Louisiana produce most of the seedling pecans. Average total production of all pecans increased 47 percent between the 1950-54 and 1969-73 periods.

Marketing Tree Nuts

There are less than 100 firms in the United States that are directly engaged in shelling tree nuts (or otherwise preparing them for market), and selling them to retail, wholesale, and industrial outlets. Approximately 45 of these firms are primarily engaged in marketing pecans. The remaining firms

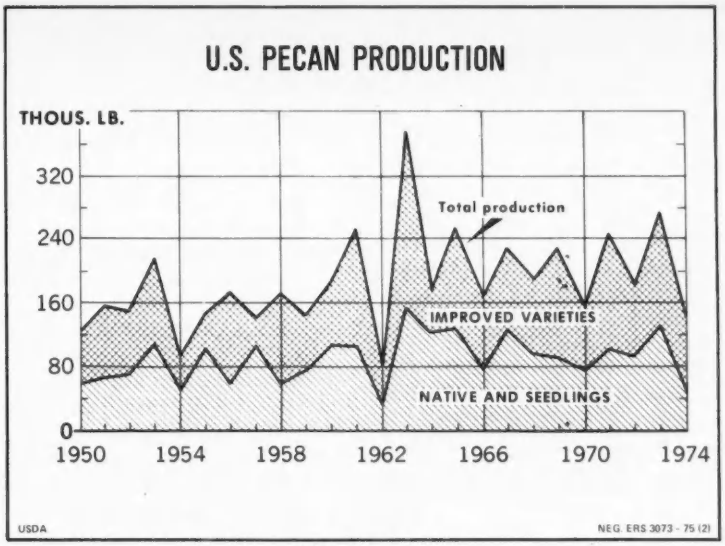

Figure 5

handle other types of nuts and are all located in California and Oregon. Marketing data in this article are based on information obtained from 44 firms that shell and process pecans, 21 firms engaged in the marketing of almonds and walnuts (most firms that handle one also handle the other), and 8 firms that market filberts. These data exclude the many accumulators of pecans scattered throughout the South and the accumulating stations for almonds, walnuts, and filberts in California and Oregon.

Almonds

The entire crop of almonds is marketed by about eight major firms and seven smaller ones, some of which are in the market only occasionally. Interviews were held with nine of the firms during the summer of 1974, and data were collected on the 1973-74 crop. The leading firm in the almond industry is the California Almond Growers Exchange, a cooperative which markets approximately 70-80 percent of the crop, depending on the year. The Exchange handles almonds exclusively, while most of the other firms handle other nuts as well. At least three of the firms are, or are subsidiaries of, large food corporations that market other food products as well as other kinds of domestic and imported tree nuts.

Of the nine principal firms interviewed, five were corporations, two were proprietorships, and two were cooperatives. The California Almond Growers Exchange, the oldest, has been in business 65 years. Two of the firms, one cooperative and one corporation, have been in business about 15 years.

Filberts

Interviews were obtained with eight firms in Oregon that market filberts. More than 80 percent of the sales of in-shell filberts were made by the four largest handlers. Over half of the total sales of filberts was made by two of the largest handlers.

Six of the Oregon firms were corporations, one was a proporietorship and one a cooperative. In 1963, there were three cooperatives marketing filberts in Oregon. The one cooperative interviewed in 1974 has since declared bankruptcy. The marketing of filberts has always been marked by rivalry among the marketing agencies and particularly among the cooperatives. Partially because there was no cohesive force in the filbert industry, marketing patterns within the industry have been slow to change. Most of the domestic filberts are marketed in-shell. Part of the reason for this is the sharp competition from imported shelled filberts. Handlers believe that demand for in-shell filberts is inelastic, in contrast to very elastic demand for domestic shelled filberts. Thus, a nearly constant quantity of in-shell filberts is sold each year, and the amount shelled varies directly with the size of the crop and prices of imported filberts. Imported shelled filberts usually comprise more than half of the total supplies. In most years, grower returns for in-shell filberts have exceeded the returns from shelled filberts. The volume regulation under the marketing order for filberts covers only the marketing of in-shell filberts.

Pecans

The number of firms involved in the accumulation, shelling, and processing of pecans declined from 136 in 1961 to 124 in 1974, and the number of pecan shellers declined from 77 to 44. The number of firms declined most in Georgia and Texas, the leading pecan States, but Georgia continued to have the largest number of shellers (13), followed by Texas and Alabama with six each.

Large Firms Increase; Small Firms Decline

Shelling firms were grouped according to the number of pounds of pecans shelled during the year (Table 1). The smallest group shelled less than half a million pounds and the largest shelled 5 million pounds or more. In 1974, the number of shellers handling more than 5 million pounds increased to 10, up from eight in 1961, while the number of small shellers declined from 18 to five. In fact, all of the decline in firm-numbers occurred in the three smaller groups—those selling less than 3 million pounds. The number of firms declined from 57 to 23 and the percentage of the crop handled by the three smaller groups of firms declined from 31 to 16 percent. Meanwhile, the number of firms selling 3 million pounds or more increased from 17 to 21 and the percentage of the crop they handled increased from 69 to 84. This is a continuation of a trend begun in the 1950's. If this continues, probably less than 20 multi-shelling-plant firms will shell all of the pecans by the mid-1980's.

Corporations are Largest Firms in Industry (Table 2)

Apparently most of the firms that left the industry between 1961 and 1974 were individual proprietorships and partnerships. The number of corporations in 1974 was 33, up from 32 in 1961. During the same period, proprietorships declined from 23 to five and partnerships from 17 to five.

Corporations now comprise approximately 75 percent of the pecan shelling firms while proprietorships and partnerships are approximately 11.5 percent each.

Walnuts

Interviews were obtained with 15 firms in California and seven in Oregon that market walnuts. Most of these firms also market other tree nuts, such as filberts, almonds, and pistachios. Most of the Oregon handlers were small. The Diamond Walnut Growers, Inc., a California cooperative, is by far the largest marketer of walnuts. It markets a vast majority of all the in-shell walnuts and also handles more shelled walnuts than any other handler. About six of the other California walnut handlers are large. Most of the rest are small and tend to emphasize the shelled market rather than the in-shell. Only one of the Oregon shellers is a real factor in the walnut industry. Although Oregon produces a walnut of good quality, recent adverse weather has decreased the number of trees. In addition, the Oregon crop is harvested much later than in California, yields per acre and kernel percentages are lower, and processing costs are higher. Thus, Oregon walnuts are at a competitive disadvantage with California walnuts.

Of the California firms that market walnuts, six are corporations or subsidiaries of larger corporations, one a cooperative, five proprietorships

Table 1—Number of shellers and processors and net sales by size of firm 1961 and 1974

Size of firm by net sales (Million pounds)	Pecan firms				Net sales[1]			
	Number		Percent of total		1,000 Pounds		Percent of total	
	1961	1974[2]	1961	1974	1961	1974	1961	1974
5 and above	8	10	11.0	22.7	78,083	136,756	48.0	68.1
3 to 4.9	9	11	12.0	25.0	34,463	36,183	21.0	18.0
1 to 2.9	20	15	27.0	34.1	34,171	24,475	21.0	12.2
.5 to .9	19	3	26.0	6.8	13,636	2,354	8.0	1.2
Below .5	18	5	24.0	11.4	3,555	916	2.0	.5
Total	74	44	100.0	100.0	163,908	200,684	100.0	100.0

[1] Shelled sales only. [2] Firms that shelled pecans in 1974.

Table 2—Number of pecan shellers and processors, by ownership characteristics and size of firm, 1961 and 1974

Size of firm by net sales (million pounds)	Type of organization							
	Proprietorship		Partnership		Cooperative		Corporation	
	1961	1974	1961	1974	1961	1974	1961	1974
5 & above	0	1	2	0	1	1	5	8
3 to 4.9	2	1	1	0	0	0	6	10
1 to 2.9	4	0	9	3	0	0	7	12
.5 to .9	4	0	3	2	0	0	12	1
Below .5	13	3	2	0	1	0	2	2
Total	23	5	17	5	2	1	32	33

and three partnerships. Most of the firms in California that are primarily walnut handlers also market other tree nuts, and most of the firms in Oregon that handle walnuts were primarily filbert handlers.

Distribution of Tree Nuts Changes

Outlets for shelled Pecans Change

Bakeries continue to be the leading user of pecans, purchasing more than 28 percent of those sold by 43 pecan shellers in 1974, compared with 38 percent in 1961 (figure 6). Confectioners are the second major outlet for pecans, using about 24 percent of the shelled sales in 1974, up from 20 percent in 1961. Most of the other outlets remained about the same at less than 10 percent, but gift packs and mail order sales rose from 1.0 percent in 1961 to 6.4 percent in 1974, and exports accounted for 5.3 percent in 1974 versus zero in 1961. Other new outlets were cereal manufacturers, 1.9 percent of shelled sales, and church donations or sales.

Outlets for Walnuts, Almonds and Filberts also Vary

For comparison, charts of the distribution of almonds, walnuts, and filberts during the 1973-74 season were also made. These charts were developed from information obtained through personal interviews with almond, filbert, and walnut handlers in California and Oregon.

The in-shell market continues to be more important for walnuts than the shelled market. About 58 percent of the walnuts are sold in-shell and 42 percent are sold shelled. Nearly all of the in-shell walnuts are sold to grocery wholesalers and chain stores (30 percent) or exported (20 percent) (Figure 7).

The largest proportion of shelled walnuts, 23 percent, are sold unsalted in retail packages to grocery wholesalers and chain stores, down from 41 percent in 1962-63. Other retailers used about 4.5 percent. Food manufacturers used 4 percent of the shelled walnuts and bakers 3 percent, down from 8 percent in 1962-63. Ice cream manufacturers and confectioners used 1.7 percent and 1.0 percent, respectively, down from 3 percent and 6 percent in 1962-63.

Approximately 4.5 percent of the almonds are sold in-shell. The in-shell nuts are sold in retail packages primarily at the holiday season (Figure 8).

Most almonds, 95.5 percent, are sold shelled. The almond industry is the great American success story in marketing. Perpetually in trouble with huge supplies and limited markets. the almond handlers have always come up with new markets and new uses. Nearly 52 percent of all the shelled almonds are exported and the other producing countries are receiving more competition from U.S. producers than they can handle.

Domestically, the major markets for almonds are: confectioners 11.2 percent; salters, 7.6 percent; cereal manufacturers, 6.5 percent; bakers, 4.5 percent; other food manufacturers, 3.8 percent; ice cream manufacturers, 3.7 percent; and other outlets (retailers, wholesalers, mail order, etc.) a total of 6 percent.

About 70 percent of the filberts are sold in-shell, up from 60 percent in 1962-63. Mixers purchased 38.5 percent, grocery wholesalers 19.1 percent, chain stores and other retailers 2.5 percent (Figure 9). Bakers purchased 7.2 percent of the in-shell filberts in 1974 and exports accounted for 2.6 percent. These percentages are comparable to 1962-63 except that exports declined from 5 percent in 1962-63.

Sales of tree nuts are especially affected by rising costs of other food commodities. Tree nuts are a relatively minor ingredient in bakery, confectionery, and other food items. As recent costs of flour, sugar, and other major ingredients have risen, food manufacturers have tried to reduce their production costs by reducing the quantity of nuts used or eliminating the nuts entirely. When the product is advertised as a nut product, however, such as pecan pralines, almond bars, walnut cake or filbert cookies, some manufacturer reduce the quantity of nuts used in the product or raise the price, or both.

The tree nut industries can partially overcome the decreased use by food manufacturers and increase consumer demand by developing new uses and new product forms and by strong advertising and sales promotion programs. The almond industry, and to a lesser extent the walnut industry, has been motably successful in this area.

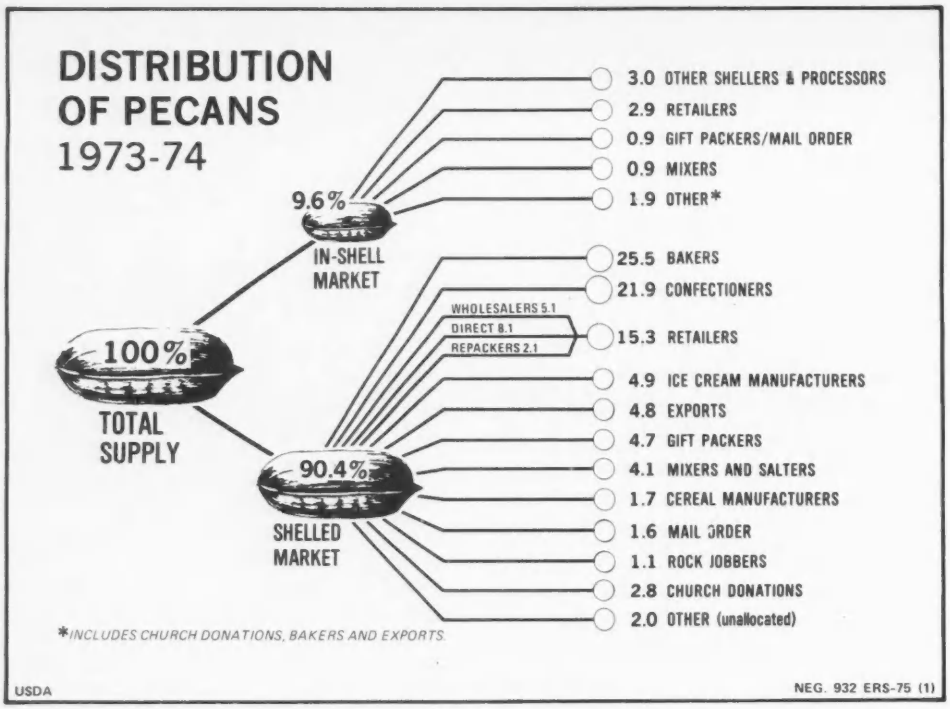

Figure 6

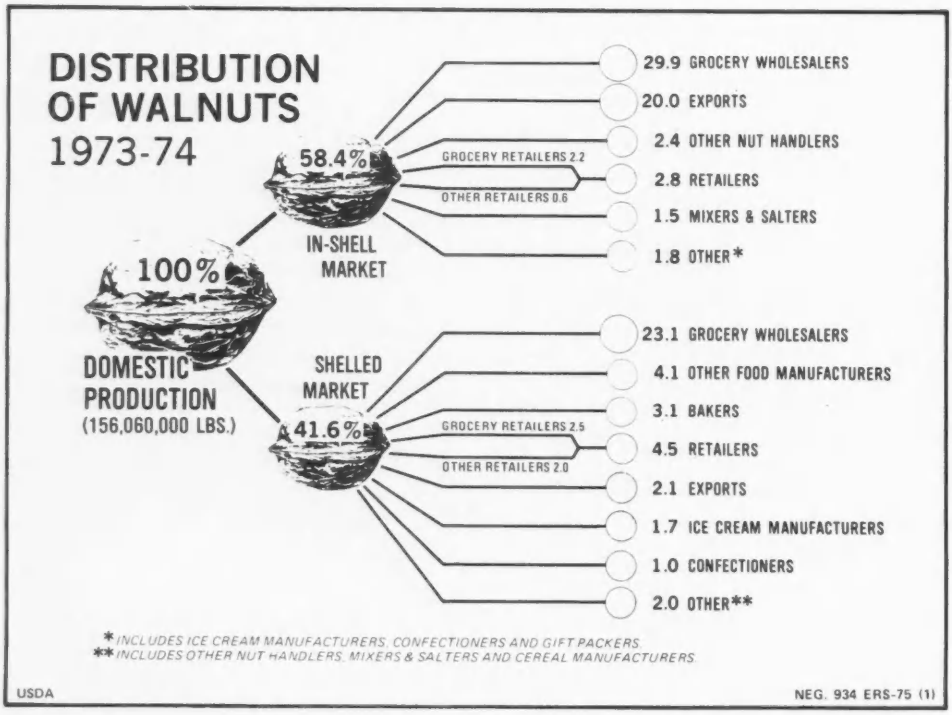

Figure 7

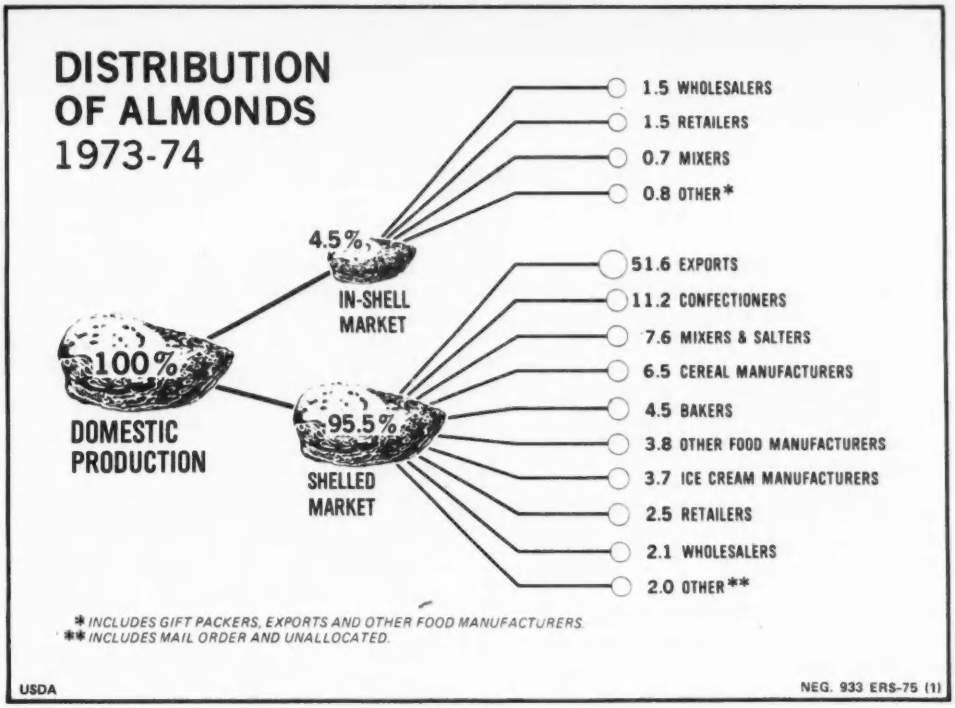

Figure 8

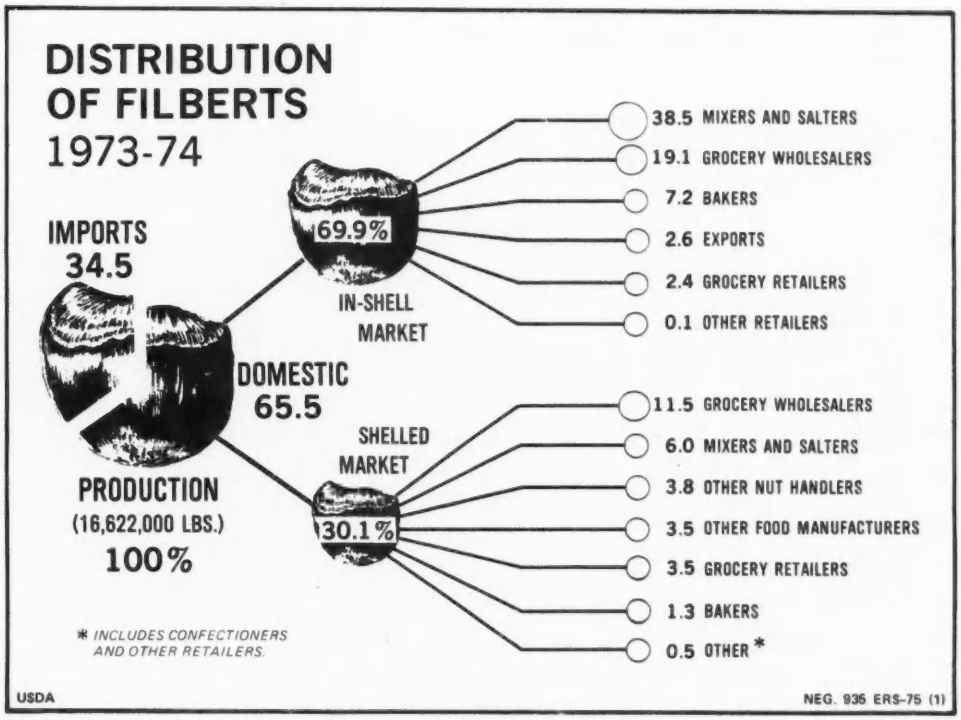

Figure 9

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